GM splits on quality pitch

By Raymond Serafin

General Motors Corp.'s plans for a corporate ad campaign targeting quality has touched off a controversy at the No. 1 automaker.

The estimated $40 million effort is designed to bring back customers who bought GM vehicles when their quality lagged behind that of competitors. But its direction and origin is creating heated exchanges between division and corporate executives, sources say.

Already angered by forced cuts estimated to be at least $80 million in division ad budgets, some division executives are sore at the usurping of marketing responsibilities by corporate headquarters.

More important, however, some division executives believe a campaign trumpeting GM quality gains isn't only premature, but will draw unwanted attention to how far GM quality had slipped.

"If you say you improved your quality, it's like saying you stopped drinking and abusing your wife. If you talk about 99% reliability, the customer wonders about the 1%."

The drive, themed "GM puts quality on the road," is expected to start about the second week of April. McCann-Erickson Worldwide, New York, created the campaign and is developing it with regular corporate agency N W Ayer.

"We're trying to send a message to people who've said they'd never buy another GM car that we're worth another look," said one source familiar with the effort.

GM corporate officials have declined comment on the campaign, but interviews with divisional and agency officials, who spoke on condition of anonymity, provided a glimpse into the internal debate.

"The statistics they're talking about using in the campaign can be perceived very negatively," one source said. "If you say you improved your quality, it's like saying you stopped drinking and abusing your wife. If you talk about 99% reliability, the customer wonders about the 1%."

An agency source echoed the theme.

"If you say you're 40% better, are you

(Continued on Page 50)

LAST MINUTE NEWS

Big Mac, Big G team

OAK BROOK, Ill.—McDonald's this week will add cold cereal and bran muffins to its breakfast menu in selected markets, including Chicago. The cereal effort involves single-serving boxes of General Mills' Cheerios and Wheaties. Chicago Bulls star Michael Jordan's role as ad spokesman for both McDonald's and Wheaties influenced the choice of the cereal, sources said. Kellogg, with a much larger foodservice division than General Mills, has been discussing a similar venture with McDonald's for the past several years. Leo Burnett USA, Chicago, handles McDonald's.

Campbell sets shop cuts

CAMDEN, N.J.—Campbell Soup Co. will inform shops this week about its finalized agency consolidation and incentive compensation system. Core shops are Backer Spielvogel Bates, BBDO Worldwide, DDB Needham Worldwide and Ogilvy & Mather, all New York; W.B. Doner & Co., Southfield, Mich.; and Hal Riney & Partners, San Francisco. Measured media spending is estimated at more than $500 million.

Clorox tests beauty soap

OAKLAND, Calif.—Clorox is testing Satine beauty bar soap, its first move into health & beauty aids, in Pittsfield, Mass.; Midland, Texas; and Eau Claire, Wis. Satine targets women 30 and older with spot TV, print and free standing inserts via Foote, Cone & Belding, San Francisco.

Toblerone up for grabs

ZURICH—Jacobs Suchard is hearing presentations from four to five agencies for a planned consolidation of its estimated $30 million worldwide Toblerone chocolate account. Believed to be pitching are European offices of Bozell; DDB Needham Worldwide; Saatchi & Saatchi Advertising; Roux, Seguela, Cayzac & Goudard; and Young & Rubicam, sources said. Most of those shops already handle parts of Jacobs Suchard in certain countries. The company recently awarded the U.S. Toblerone account to Hill, Holliday, Connors, Cosmopulos, New York.

Ragu Fresh under fire

GREENWICH, Conn.—Chesebrough-Pond's Ragu Fresh Italian pasta sauces are being targeted by competitors, consumers and state government groups. They've asked the Food & Drug Administration to investigate what they say is Ragu's claim that the jarred, heat-packed sauces are "fresh." Chesebrough said its

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Health claim alert .... **P. 2**
FDA prepares to send regulatory letters to several food marketers.

Lamaze delivery .... **P. 4**
Lamaze tests a "Seal of Support" and looks for product sponsors.

Juicy battle .... **P. 12**
Tropicana and Minute Maid debate who's on top in the orange juice market.

Costly controversies

Nissan turbo, Reebok bungee spots off the air

By Pat Sloan and Cleveland Horton

Reebok International may have to eat sizable production costs if the Chiat/Day/-Mojo-created bungee-jumping TV spot never bounces back onto the airwaves.

But Reebok won't be alone.

Nissan Motor Corp. USA, another Chiat client, has agreed not to run a pricey 300ZX Turbo spot anymore, even though it was directed by Ridley Scott.

So far, Reebok's commercial has run four times; Nissan's ran once. That means the two advertisers may have spent more than $1 million combined in production fees for commercials that received little airtime and a lot of controversy.

Reebok's bungee spot was pulled after consumer complaints; Bob Garfield's Ad Review talks about why—Page 52.

The Nissan spot cost an estimated $750,000 to produce.

The Insurance Institute for Highway Safety, a lobbying group, last week claimed a victory when it received a letter from Nissan Motor Co. Chairman Takashi Ishihara assuring that the Turbo spot "will not air again."

Institute President Brian O'Neill had called the Turbo spot one of the worst examples of speed advertising he'd ever seen.

The institute said it was joined by 18 other safety groups in its efforts to oppose the commercial.

A Nissan spokesman said, "I have to

(Continued on Page 52)

Sponsors shine at Oscars

By Wayne Walley

It's not the Super Bowl, but it's close.

Tonight's 62nd annual Academy Awards telecast on ABC will be an advertising launch pad second only to pro football's extravaganza.

Most of the gala's nine sponsors, including AT&T Co., General Motors Corp., Revlon, McDonald's Corp. and Coca-Cola USA will use the Oscars to showcase new commercials.

"The Academy Awards is there to honor the best, so it's a very nice environment for a [campaign] launch," said Dannielle Colliver, Chevrolet's advertising manager-passenger cars.

The only sponsors that aren't expected to air at least one new spot during the telecast are Prudential Insurance Co. of America, caught in the middle of an agency change; Eastman Kodak Co., waiting till June to launch a new promotion tied to Disney characters; and Campbell Soup Co. The ninth sponsor, J.C. Penney Co., plans at least one new execution of a repositioning campaign that broke on the program last year.

Each 30-second spot in the live telecast, starting at 9 p.m. (ET) and hosted this year by comedian Billy Crystal, sold for $425,000, a 13% increase from 1989.

With the hoopla surrounding the Best Picture, Best Actor and Best Actress awards and the best-dressed attendees, the Oscars year in and year out offer advertisers a vehicle usually only surpassed by the Super Bowl—or, in some years, the Grammy Awards—for introducing major new campaigns or products.

Last year's telecast on ABC, panned by TV critics worldwide for its laborious mu-

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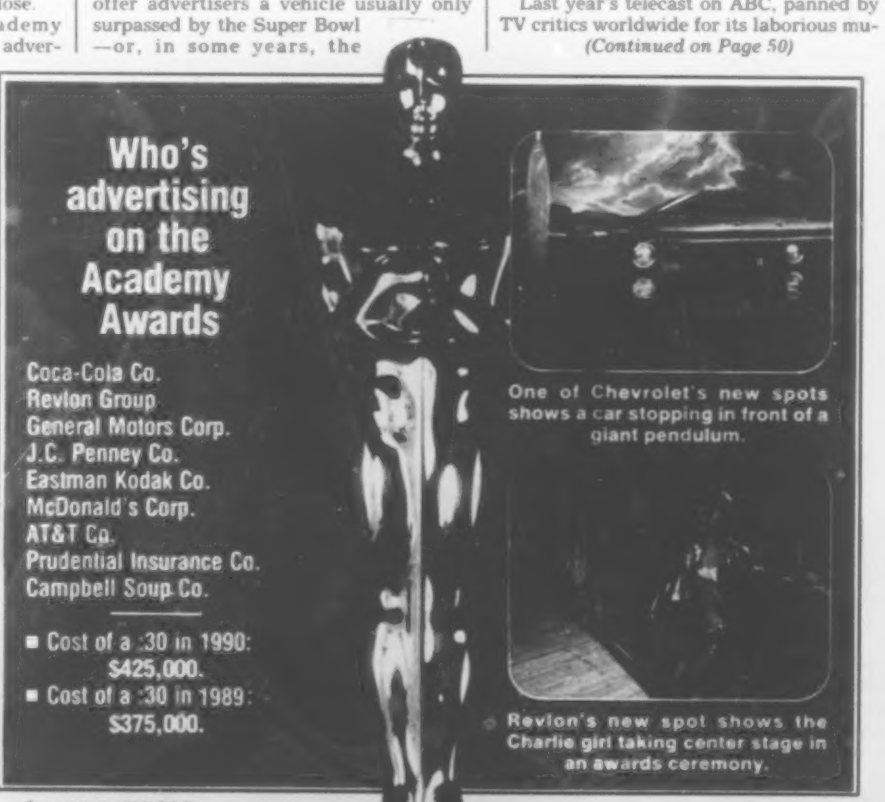

Who's advertising on the Academy Awards

Coca-Cola Co.
Revlon Group
General Motors Corp.
J.C. Penney Co.
Eastman Kodak Co.
McDonald's Corp.
AT&T Co.
Prudential Insurance Co.
Campbell Soup Co.

- Cost of a :30 in 1990: $425,000.
- Cost of a :30 in 1989: $375,000.

One of Chevrolet's new spots shows a car stopping in front of a giant pendulum.

Revlon's new spot shows the Charlie girl taking center stage in an awards ceremony.

Oscar statuette ©A.M.P.A.S.

FDA readies notices on errant food claims

By Laurie Freeman

WASHINGTON—The Food & Drug Administration is poised to send regulatory letters to several food marketers it believes are making claims outside the boundaries of proposed rules on label health messages.

Food marketers making claims for oat bran and no-cholesterol products head the FDA's hit list.

"It won't be today and it won't be tomorrow, but it will be very soon," FDA Chief of Staff Joseph Levitt said last week before a food industry conference. "We are in the process of collecting labels to see which we should call manufacturers' attention to."

The FDA letters will "explicitly demonstrate the areas we believe exceed the boundaries" for health claims on food labels, Mr. Levitt said.

The chosen companies will be "examples" of how the FDA will enforce its health claims policy in the interim period before the proposed food-label guidelines become final, he said.

"We urge all companies to check these examples against their own [product] labels," Mr. Levitt said.

Since no health claims rule has ever been finalized, the FDA has the authority to challenge any such claims under existing regulations.

Although Mr. Levitt declined to identify the companies during a conference held by the independent Food, Drug & Law Institute, other FDA officials hinted that the first enforcement actions could be taken against oat bran products.

Ed Scarbrough, acting director of FDA's Office of Nutrition & Food Sciences, said claims for oat bran, especially in some cereals, doughnuts, cookies and pretzels, "are inappropriate based on the level of oat bran present" in those foods.

"We intend to take action soon against the most egregious claims," he said.

> **"We urge all companies to check these [food label] examples against their own [product] labels."**

Food industry executives believe the FDA will target high-fiber cereals and foods such as peanut butter and cooking oils that make no-cholesterol claims even though many may contain high amounts of saturated fat.

"Nearly every example they [FDA] give when they talk about health claims is either oat bran cereals, psyllium-based cereals or no-cholesterol/saturated-fat products," said a food company executive who requested anonymity.

The proposed new policy would allow health claims only about fiber and colon cancer; fiber and heart disease; fats and cancer; fats and heart disease; sodium and high blood pressure; and calcium and osteoporosis.

The 60-day comment period on the proposal closes April 9, but the FDA expects companies and interested organizations will file petitions to extend the comment period.

The new policy could take a year to implement after the final rule is published in the Federal Register. Marketers' comments will be taken into consideration before the final rule is published.

The proposed regulations would require marketers to support all claims with FDA-approved summaries of scientific evidence. The FDA said it will rely primarily on the 1988 Surgeon General's Report on Nutrition & Health and research endorsed by the National Academy of Sciences in evaluating claims.

The FDA's Mr. Scarbrough, however, admitted the agency won't know "how much or what kinds of evidence" will be needed to substantiate health claims until the FDA starts enforcing the policy.

Quaker Oats Co., which aggressively advertises the beneficial aspects of its oatmeal and oat bran cereals, intends to defend its position in comments to the FDA.

Thomas Howell, Quaker's VP-general corporate counsel, said the marketer's comments will emphasize that the "overwhelming body of research on oats and cholesterol reduction meets the [FDA's] test for significant scientific agreement" and that the company should be allowed to continue making that claim. □

'Newsweek' taps Eldredge

By Scott Donaton

NEW YORK—The appointment of Peter Eldredge as U.S. publisher of *Newsweek* shows the publication wants a more aggressive presence on Madison Avenue, industry observers say.

Mr. Eldredge, 45, VP-group sales at Murdoch Magazines since last December, will join *Newsweek* April 2.

He previously was publisher of *Premiere*, publisher of the *Star* and ad director at *New York Magazine*.

The Washington Post Co. newsweekly also announced last week that Worldwide Publisher Howard Smith, 55, a 25-year veteran, will retire at yearend.

Mr. Eldredge and Peter Luffman, president of *Newsweek International*, will report to Mr. Smith until his retirement. After Mr. Smith leaves, both executives will report directly to *Newsweek* President Alan Spoon.

Industry insiders speculate Mr. Spoon, who assumed the president's post last September, wants a greater role in the title's day-to-day operations.

"Alan Spoon had an understanding with [Washington Post Co. Chairman] Katharine Graham that he was going to be a cowboy and do things his own way," said one source close to the company.

"I suspect it has to do with Alan Spoon," added Joseph Ostrow, exec VP-worldwide media director at Foote, Cone & Belding. "It may well be he's putting his own team in place."

P. Eldredge

Referring to speculation that Mr. Spoon forced Mr. Smith's retirement, Mr. Ostrow said: "If you look at the performance of the magazine, it's not exactly skyrocketing, and sometimes when the team's not playing well, the manager gets the boot."

But Mr. Smith insisted the decision was his own.

"After 25 years of running around the world, I'm getting tired and that's the honest truth," he said. "Alan's been vociferous in his efforts to get me to stay."

Mr. Spoon was out of the country at press time and couldn't be reached for comment. In a prepared statement, he said, "Howard Smith's contributions to *Newsweek's* success have been both far-ranging and of fundamental importance. We'll miss him greatly."

Newsweek, despite record ad revenues of $255.9 million last year, a 5.9% gain, is perceived by many in the ad community as the most vulnerable major newsweekly.

The magazine's ad pages were flat in 1989 for the second straight year at 2,495.3, Publishers Information Bureau figures showed. Through February, ad pages were off 13.7% to 308.5. Ad revenues were down 5.7% for the same period to $33.2 million.

Before joining Murdoch in 1984, Mr. Eldredge was at Time Inc. Magazine Co.'s *Money* for eight years, serving in posts ranging from corporate ad director to special projects director.

"I think Peter brings two things to the *Newsweek* organization," Mr. Ostrow said. "One, he's an old Time Inc. man and a little of that understanding can do *Newsweek* good. Two, his knowledge of how to deal with advertisers and agencies, his street smarts, will help them. He's going to be out in the streets, pushing and selling."

Page Thompson, exec VP-media director at DDB Needham Worldwide, labeled Mr. Eldredge's appointment to the vacant post "an excellent move."

"Peter's a great publishing person with a varied experience. I don't think they could've picked a better person," he said.

Mr. Eldredge referred queries to *Newsweek* and said only, "This is a great opportunity to work for a very prestigious organization. It will be a real exciting challenge." □

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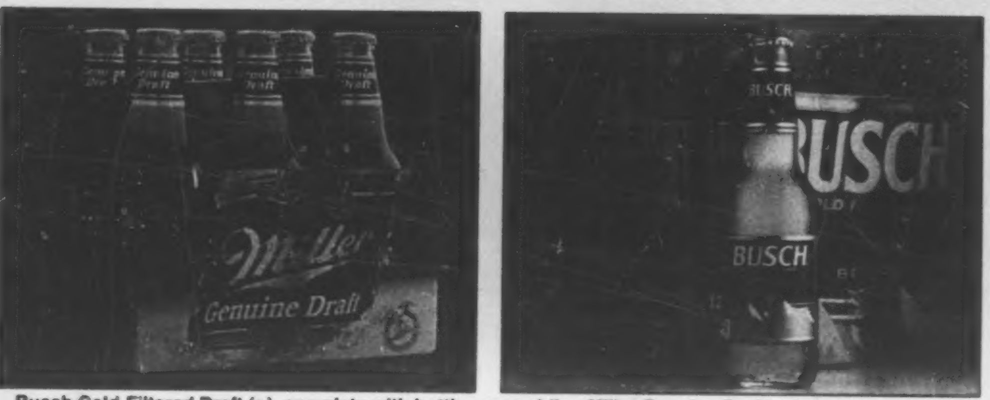

Busch Cold-Filtered Draft (r.), complete with bottles resembling Miller Genuine Draft's, is testing in Tulsa.

Draft beer look-alike

A-B brings out another rival to Miller

By Ira Teinowitz

Anheuser-Busch is testing what may be the ultimate weapon—a look-alike—in its fight to seize the initiative from Miller Brewing Co.'s fast-growing Miller Genuine Draft.

The No. 1 brewer last week began test marketing Busch Cold-Filtered Draft in Tulsa, Okla. Unlike Busch Light Draft, which rolled out last month, the new entry is packaged in a clear bottle and has a black label. Those are prominent features of Miller Genuine Draft.

One difference is that Busch is priced lower than Genuine Draft.

A-B in the past has marketed all its beers in brown bottles. The company has said light streaming through clear bottles could affect the hops and that the only alternative was to switch to chemically altered hop extracts that were less sensitive to light.

Since then, A-B has developed six-pack packaging that completely blocks out light, and its research has shown people like clear bottles.

Initial advertising for Busch, from DDB Needham Worldwide, Chicago, will be in newspapers, but long-term marketing decisions haven't been made yet.

This is A-B's third—and most direct—attack on Miller Genuine Draft this year.

Earlier this year, A-B expanded Busch Light Draft, its first packaged draft beer, to distribution in the 46 states in which Busch beers are distributed.

Also, A-B executives recently acknowledged that one of the targets for Bud Dry, a draft product now being introduced nationally, is Miller Genuine Draft.

Miller claims Genuine Draft, now the 10th best-selling beer in the U.S., is continuing to grow at double-digit rates that make its growth pace the fastest among the nation's leading brews.

Backer Spielvogel Bates Worldwide, New York, handles Genuine Draft.

Last year, Genuine Draft sold 4.7 million barrels, up 20.5%, reported *Beer Marketer's Insights*. ☐

Minute Maid claims OJ lead

By Jennifer Lawrence and Judann Dagnoli

Coca-Cola Foods is juicing up Minute Maid, claiming the brand has moved into first place in the $3 billion orange juice market.

A letter to the Coca-Cola Co. unit's employees from President-CEO Harry E. Teasley Jr. said Nielsen Marketing Research Group's ScanTrack data show Minute Maid as the "undisputed" leader.

But Tropicana Products disputed the claim and said Arbitron/SAMI figures show that Tropicana, a unit of Jos. E. Seagram & Sons, is No. 1.

Martin Gutfreund, Tropicana VP-administration, questioned the timing of Mr. Teasley's letter and its release to the media, citing Tropicana's annual three-day meeting with citrus growers that starts March 27.

"Could [the letter] be part of a plot to steal thunder from our upcoming event?" Mr. Gutfreund asked.

Pierre Ferrari, Coca-Cola Foods' senior VP-consumer marketing, readily admitted there's no coincidence.

"We're puzzled by [Tropicana's] continuing assertion that they are No. 1," he said. "We are by far the larger producer and marketer of OJ. We are getting a little irritated" with Tropicana.

Tropicana said its numbers would support the company's leadership claim, but the data couldn't be supplied to *Advertising Age* by press time.

Mr. Teasley's letter recaps Minute Maid's 1989 performance, citing the figures based on ScanTrack data:

- Minute Maid orange juice retail volume was up nearly 19%.
- Minute Maid's share of the U.S. retail orange juice business for the 52 weeks ended Jan. 27 was 23.4%, "up 1.3 points from a year earlier and [plus] 0.3 points vs. our nearest competitor." The market is made up of frozen concentrate and chilled, ready-to-drink OJ.
- Minute Maid narrowed the gap with the chilled segment leader (Tropicana) "with a 21.8% share for Minute Maid, up 2.7 points from a year earlier and [plus] 1.3 points vs. the leader."

The company is "making progress toward our goal to become No. 1 overall in chilled orange juice," Mr. Teasley said in the letter. ". . . Coca-Cola Foods, through the Minute Maid brand, is the undisputed leader of the orange juice business in the U.S., and that lead is increasing." ☐

AdWatch survey of advertising awareness Top 10 in February

In February, 1,000 people were asked: Of all the advertising you have seen, heard or read in the past 30 days, which advertising first comes to mind? Source: Gallup Organization, Lincoln, Neb.

Rank			
2/90	1/90	Advertiser	Agency
1	4	Coca-Cola	McCann-Erickson Worldwide
2	1*	Pepsi-Cola	BBDO Worldwide
3	1*	Ford	J. Walter Thompson USA
4*	3	Budweiser/Bud Lite	D'Arcy Masius Benton & Bowles/- DDB Needham Worldwide
4*	9	Diet Coke	Lintas:New York
6	5*	McDonald's	Leo Burnett USA
7	7	Chevrolet	Lintas:Cambell-Ewald
8*	5*	Infiniti	Hill, Holliday, Connors, Cosmopulos
8*	—	Automobiles (general)	Various
10	10	Toyota	Saatchi & Saatchi DFS/Pacific

*Indicates tie

Coke, Pepsi take top ad-recall spots

By Kate Fitzgerald

The latest round of cola wars made Coca-Cola and Pepsi-Cola solid winners in last month's ad recall race.

Coca-Cola was No. 1 on the list of the best-recalled advertising for February, closely followed by Pepsi-Cola, *Advertising Age's* monthly adWatch survey found. Both cola marketers broke major campaigns during the Jan. 28 Super Bowl.

Diet Coke made its first appearance ever among the 10 best-recalled ads in January and last month moved up to fourth place, tied with Anheuser-Busch's Budweiser, from ninth.

Infiniti, riding on the fumes of its mysterious "rocks and trees" campaign, made the top 10 again, though the luxury cars from Nissan Motor Corp. USA slid to eighth from fifth place.

AdWatch is a joint project of *Ad Age* and the Gallup Organizaton. Advertising awareness is measured by asking a nationally projectable sample to name the first advertising that comes to mind from all seen, heard or read in the

(Continued on Page 44)

AA picks Best Print ads

CHICAGO—Ten finalists have been selected in *Advertising Age's* Best Print Ads of 1989 competition.

The Best Magazine Ad and Best Newspaper Ad, selected from entries submitted by agencies, advertisers and *Ad Age* staffers, will be announced at the fifth annual *Ad Age* Awards Dinner, hosted by comedian Jerry Seinfeld April 26 at the Chicago Marriott Downtown.

Best Magazine Ad finalists:

- **Eastman Kodak Co., b&w film (Rumrill-Hoyt)**—Striking close-up photo by Gregory Heisler of Luis Sarria, former masseur to Muhammad Ali, shows wonderful facial detail. Photo plus the headline, "The soul of black and white," underscore quality of Kodak's b&w film.
- **Procter & Gamble Co., Pepto-Bismol tablets (Leo Burnett USA)**—Color photo of restaurant's chalk-printed "slate" menu lists greasy foods—hamburger, chili dog, bratwurst, cheese nachos, onion rings, etc. The lower right-hand corner has a picture of a box of Pepto-Bismol tablets and the line, "The one that coats is the only one you need."
- **Donna Karan New York, hosiery (Arnell/Bickford Associates)**—Striking b&w photo showing only a woman's crossed, hose-clad legs as she reclines on a chair. Reminiscent of photographer Man Ray's style.
- **Blue Diamond Growers, almonds (Saatchi & Saatchi DFS/-Pacific)**—Humorous color spread depicts purported gourmet treats featuring almonds: "Amande Suisse" (almond with chocolate sauce dabbed on it); "Pasta alle Mandorle" (almond with one strip of pasta wrapped around it); "Nachos y Alemdaras" (almond and cheese on nacho), etc.
- **Stanley Tools (Della Femina, McNamee WCRS)**—Page ad headlined "Some rules aren't made to be broken" has a 25-foot, yellow metal tape measure winding through long copy that stresses durability of Stanley tools.

BEST PRINT ADS

Best Newspaper Ad finalists:

- **Midway Airlines (Campbell-Mithun-Esty)**—Partial page b&w ad with liberal use of white space is headlined "Avoid the ORDeal," using a baggage tag from Chicago's O'Hare International Airport (ORD) as part of the headline. The point, underscored in copy, is that the carrier flies from the more accessible, less crowded Midway Airport.
- **American Honda Motor Co. (Ketchum Advertising)**—"Where is your car parked?" asks a b&w spread with scroll ranking cars by J.D. Power & Associates Customer Satisfaction Index. Honda's Acura is No. 1, with Mercedes-Benz second. Honda, Toyota and Cadillac round out the top five. In all, 15 are shown in the photo.
- **Monsieur Henri Wines, Stolichnaya Russian vodka (Calet, Hirsch & Spector)**—B&w page with minimal copy features illustration of a Stoli bottle with two warships inside, bearing the U.S. and Soviet flags. Headline is "Here's to smooth sailing." Body copy explains that the countries the next day begin their historic summit at sea. Advertising congratulates "both countries on creating warmer waters."
- **Girl Scouts USA (Chiat/Day/-Mojo)**—Headline, created from unmatched and askew cut-and-paste letters, is "Sex and drugs and cinnamon roll." Body copy: "Learn how to deal with the first two, and how to bake the third. The Girl Scouts—as great as you want to make it."
- **Steinway & Sons (Kelley & Wallwork)**—Silhouette of figure at grand piano against white backdrop with the headline: "A Steinway will never sound quite the same again." At the bottom of the ad: "Vladimir Horowitz 1903-1989."

At the awards dinner, *Ad Age* will also honor the Best Business-to-Business Ad of 1989, as selected by sister publication *Business Marketing*.

The winning print execution, for Hunter Associates Laboratory (by KSK Communications), shows a photo of a cross-eyed, green-faced little girl staring at a soda with weirdly colored scoops of ice cream. The adjoining copy says such bad color reproduction can be avoided by using Hunter's Printed Image Color Control System.

Tickets to the dinner are $200 per person. For more information, call (312) 649-7794. ☐

March 26, 1990

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Advertising Age®

Crain's International Newspaper of Marketing

1989 EDITION

FIRST RANKING OF THE WORLD'S TOP 100 AGENCIES

Dentsu grabs the crown; Young & Rubicam takes the U.S.

William Coupon

U.S. AGENCY OF THE YEAR

Bringing Advertising Age's U.S. Agency of the Year honors to San Francisco for the first time are the three partners of Goodby, Berlin & Silverstein (from left): Jeffrey Goodby, Andrew Berlin and Richard Silverstein.

Santos Cinto

INTERNATIONAL AGENCY OF THE YEAR

Contrapunto's top creatives, Jose Maria Lapena, co-chief creative director, Teo Marcos, president, and Juan Mariano Mancebo, co-chief creative director, give Spain its first Advertising Age International Agency of the Year award.

Ad Age 500 grows 9.7%; billings top $85 billion

Dentsu, with gross income of $1.32 billion, remains the world's biggest shop, comfortably ahead of Saatchi

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By R. Craig Endicott

Dentsu Inc. defended its crown as the world's largest advertising agency by pushing its gross income from advertising to $1.32 billion, far outdistancing pesky Saatchi & Saatchi Advertising Worldwide, a unit of Saatchi & Saatchi Co., according to *Advertising Age's* 46th annual Advertising Agency Income Report.

Growth in both U.S. and international gross income and billings of U.S.-based agencies comprising the *Ad Age* 500—a barometer of the ad community worldwide—slipped both domestically and abroad to 9.7% in 1989 from 16.9% growth worldwide in '88. Worldwide gross income in 1989 was $12.4 billion on billings of $85.4 billion.

The components of the worldwide gains demonstrate again that growth for the *Ad Age* 500 remains weighted to activity abroad. U.S. results in '89 advanced 6.8% to $7.3 billion in gross income on $51.5 billion in billings, while international returns for the year grew by 14.2% to $5.3 billion in gross income.

In 1988, the international rate was a formidable 29.9% because of a weaker dollar.

The power of international returns—foreign billings of the *Ad Age* 500 accounted for 39.6% of the index's worldwide billings—coupled with the frenzied growth in the global ad community influenced the ranking of the world's Top 100 agencies.

This year, agencies qualified for the ranking regardless of their country of origin. In the past, *Ad Age's* major ranking was worldwide gross income of U.S.-based agencies.

The new ranking *(see Page S-6)* proves the industry dwells in a global ad village, albeit one heavily influenced by U.S. multinationals.

Of the world's Top 100 agencies, 28 were from the Pacific's western rim, 18 were European and 46 were U.S.-based. Parent agencies were ranked by their consolidated totals; their majority-owned subsidiaries, if accounted for in the parent's totals, were not given a separate ranking.

Dentsu's lead in the world's Top 100 was so commanding the real drama in the worldwide race was who would finish second. Saatchi & Saatchi Advertising, for the first time ever, squeezed past No. 3 Young & Rubicam by recording a 20.2% annual growth, to $890 million in gross income worldwide compared with Y&R's $865.4 million, up 14.2%.

Y&R drew $409.5 million of its gross income from the U.S., a 9.9% increase, to keep its tenuous grip on the No. 1 spot in the U.S., narrowly repelling fast-charging Saatchi & Saatchi Advertising with U.S. gross income of $395.2 million, up 21.1%.

Saatchi's parent, London-based Saatchi & Saatchi Co., tumbled from the top spot among agency holding companies worldwide. Acquisition-loaded WPP Group, also London, unseated Saatchi & Saatchi with $2.4 billion in worldwide gross income, up 18%, on billings of $16.1 billion.

WPP overtook Saatchi on the basis of its acquisition last year of Ogilvy Group. Ogilvy Group ranked No. 5 among the world's mega-groups in 1988 returns with $865 million in gross income.

Saatchi, which had gross income of $2.3 billion, up 15.6%, on billings of $15.8 billion, had led all mega-groups since overtaking Interpublic Group of Cos. in 1986.

Saatchi did, however, draw more of its business from media-related advertising than WPP.

Holding companies are so dominant in the ad business that aside from Dentsu, Y&R and No. 10-ranked Hakuhodo, Tokyo, all the other top 10 positions on the world's Top 100 went to the New York-based multinational agencies of either Saatchi & Saatchi Co., WPP, Interpublic or Omnicom Group. Omnicom is the parent of BBDO Worldwide and DDB Needham Worldwide.

Backer Spielvogel Bates Worldwide, the other agency network under the Saatchi & Saatchi Co. umbrella, finished fourth on the world's Top 100 chart with gross income of $759.8 million, up 10.2%, on billings of $5.1 billion.

McCann-Erickson Worldwide, an Interpublic agency, claimed the No. 5 spot with gross income of $715.5 million, up 8.9%, on billings of $4.8 billion; Ogilvy & Mather Worldwide took No. 6 with $699.7 million gross income, up 10.1%, on billings of $4.8 billion; BBDO Worldwide finished No. 7 with $656.6 million gross income, up 12.1%, on billings of $4.6 billion; WPP's J. Walter Thompson Co. claimed No. 8 with $626.4 million gross income, up 12%, on billings of $4.4 billion; Lintas:Worldwide, another Interpublic shop, finished No. 9 with $593.3 million gross income, up 10.4%.

The Japanese, the most powerful force on the chart apart from the U.S. multinationals, held 22 places and produced a composite gross income of $3.2 billion on billings of $24.6 billion.

The 46 U.S. agencies among the Top 100 turned in an aggregate $10.5 billion in gross income on billings of $70.1 billion. The top 15 U.S. agencies, largely the multinational contingent from the U.S., have their tentacles everywhere. Their international operations accounted for 631 of the 1,006 agencies from 76 countries reporting in the international section of this issue.

Growth, compared with prior years, was relatively modest among Japanese agencies in 1989, even though most came in above 10%.

A slowdown in the Japanese economy and a decline of 3.1% in the yen against the stronger dollar in 1989 were contributing factors. And apart from Dentsu and Hakuhodo, no other Japanese agency finished in the top 20.

The Japanese results came largely from client bases indigenous to Japan. These agencies are poised to expand, however; they are being forced to do so as their multinational clients cover the globe. For example, Hakuhodo, involved in joint ventures with McCann-Erickson Worldwide and Lintas:Worldwide, turned to TBWA Advertising, No. 28 worldwide, to help with the Nissan corporate account in Europe.

Others involved in joint ventures, particularly with U.S. and European agencies, that could evolve into business and new alignments elsewhere include Tokyu Agency International, Tokyo, with No. 15 D'Arcy Masius Benton & Bowles, New York; Daiko Advertising, Osaka, with No. 12 Foote, Cone & Belding Communications, Chicago, and No. 13 Grey Advertising, New York; Dai-Ichi Kikaku, Tokyo, with Omnicom's Kresser Craig/D.I.K., Rapp Collins Marcoa and No. 11 DDB Needham; No. 45 Orikomi Advertising, Tokyo, with Backer Spielvogel Bates; and even Dentsu, with HDM (in Korea) and Y&R's Burson-Marsteller.

The French, second to none in devising complex agency acquisition schemes, are well represented through No. 16 EWDB Worldwide, No. 17 Publicis-FCB Communications B.V. and No. 20, RSCG Group, Paris.

EWDB is a late 1989 merger of the agencies held by London-based WCRS Group and Paris-based Eurocom, two agency holding companies. The amalgamation is led by its top U.S. shop, Della Femina, McNamee; WCRS Mathews Marcantonio in the U.K.; Belier EWDB in

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Contrapunto's storytelling wins a feather in its cap.

Advertising Age's top 10 agencies of 1989

Top 10 agencies worldwide

Rank	Agency	Worldwide gross income	% chg
1	Dentsu Inc.	$1,316.4	11.9
2	Saatchi & Saatchi Advertising Worldwide	890.0	20.2
3	Young & Rubicam	865.4	14.2
4	Backer Spielvogel Bates Worldwide	759.8	10.2
5	McCann-Erickson Worldwide	715.5	8.9
6	Ogilvy & Mather Worldwide	699.7	10.1
7	BBDO Worldwide	656.6	12.1
8	J. Water Thompson Co.	626.4	12.0
9	Lintas:Worldwide	593.3	10.4
10	Hakuhodo Inc.	585.5	12.1

(See Page S-6 for a ranking of 100 agencies worldwide.)

Top 10 U.S. brand-name agencies

Rank	Agency	U.S. billings	% chg
1	Leo Burnett Co.	$1,945.3	10.2
2	J. Walter Thompson Co.	1,786.0	3.7
3	Saatchi & Saatchi Advertising Worldwide	1,706.3	4.7
4	D'Arcy Masius Benton & Bowles	1,595.6	19.3
5	Foote, Cone & Belding Communications	1,578.5	4.0
6	Young & Rubicam	1,453.9	(4.9)
7	Grey Advertising	1,434.1	30.1
8	Ogilvy & Mather Worldwide	1,419.2	14.4
9	DDB Needham Worldwide	1,316.5	4.5
10	McCann-Erickson Worldwide	1,299.8	7.0

(See Page S-10 for the top 50 brand-name agencies.)

Top 10 agencies by U.S. gross income

Rank	Agency	U.S. gross income	% chg
1	Young & Rubicam	409.5	9.9
2	Saatchi & Saatchi Advertising Worldwide	395.2	21.1
3	BBDO Worldwide	373.6	9.7
4	Backer Spielvogel Bates Worldwide	310.7	9.9
5	Ogilvy & Mather Worldwide	305.1	8.6
6	DDB Needham Worldwide	302.9	24.0
7	Leo Burnett Co.	288.8	9.6
8	Foote, Cone & Belding Communications	280.5	2.5
9	J. Walter Thompson Co.	266.5	3.5
10	Grey Advertising	240.7	5.6

(See Page S-14 for a ranking of the top U.S. agencies.)

Notes: Dollars are in millions.

Agencies

(Continued from Page S-1)

Paris; and Ball Partnership in Australia and Hong Kong.

The two holding companies exchanged stock and created in effect two EWDBs with different ownership structures. The alignment gives Paris indirect voting control amounting to 80% rather than the 60% controlled directly.

Publicis-FCB is what has been termed "an alliance" of the former Foote, Cone & Belding Communications' European shops and Publicis Communications' U.K. and continental shops. The exception is Publicis Conseil which contributes 30% (up from 20% in 1989) to the venture "directly."

Indirectly, however, the Paris shop is bound more tightly into the alliance than its share would indicate. Publicis-FCB in last year's issue had been a merger of Publicis Communications and Foote, Cone & Belding Communications. It was unbundled this year because FCB operates independently outside Europe.

The stronger dollar in 1989 in general reduced the growth rate (in dollars) of non-U.S. agencies. The German mark dropped 6.9% against the dollar, the British pound, 5.5% and French franc, 7.3%.

Despite these fluctuations, the international subsidiaries of agencies in the *Ad Age* 500 grew an exceptional 14.2% in billings.

Still, that hardly compares to annual growth rates in 1988 and 1987 of 30.6% and 55.9%, respectively, from the same agencies.

U.S. Top 100

While Y&R continued its mastery of the U.S. Top 100 and Saatchi & Saatchi a client shy of passing it, BBDO Worldwide bore down to claim third place with gross income of $373.6 million, up 9.7%, on billings of $2.7 billion.

Three more agencies topped the $300 million range: No. 4 Backer Spielvogel Bates with $310.7 million gross income, up 9.9%, on billings of $2.2 billion; No. 5 Ogilvy & Mather Worldwide with gross income of $305.1 million, up 8.6%, on billings of $2.1 billion; and No. 6 DDB Needham Worldwide with gross income of $302.9 million on billings of $2.4 billion.

DDB Needham made the biggest leap—from No. 9 in 1988—based on a phenomenal 24% year-to-year growth. Four acquisitions, including the San Francisco office of D'Arcy Masius Benton & Bowles, capped its strong year for account gains.

Because of the new policy of not ranking subsidiaries whose totals already are included in a ranked parent company, the U.S. rankings ran deeper into the ad community than usual.

Chicago's black-owned agency, Burrell Communications Group, secured No. 100 with gross income of $9 million, up 0.5%, on billings of $60.3 million. In previous years, the ticket to the U.S. Top 100 was $11 million in gross income.

Agency brands

Leo Burnett Co., No. 7 in U.S. gross income, built onto its lead as the largest U.S. "brand" agency in recording brand billings of $1.9 billion. An agency "brand" is the core agency minus billings from subsidiaries, specialty units, sales promotion and direct marketing.

Subsidiary tiering over the years has made it hard to define this agency core that still competes for business. J. Walter Thompson Co. replaced Saatchi & Saatchi Advertising as the No. 2 brand, still $159.3 million in billings short of Burnett.

Media kings

The *Ad Age* 500, represented as the top 500 agencies in the U.S., amassed total spending of $36.6 billion in U.S. media. Network TV claimed 28.8% of the total and was paced by Saatchi & Saatchi with spending of $918.6 million; next was Burnett at $855.1 million.

Saatchi led spot TV as well, with $622.4 million in spending; No. 2 spender was sister agency Backer Spielvogel Bates with $525.2 million.

Saatchi & Saatchi also claimed the consumer magazine title with $422.1 million in spending, far ahead of Y&R at $280.7 million.

DDB Needham finished ahead in newspapers, claiming billings of $240.5 million in the medium. JWT was second at $226.5 million. ☐

Mega-groups minus non-media advertising

Rank 1989	Rank 1988	Group	Worldwide gross income 1989	Worldwide gross income 1988	% chg	Worldwide billings 1989	Worldwide billings 1988
1	1	**Saatchi & Saatchi PLC**, London	$1,650	$1,474	11.9	$11,193	$10,087
2	5	**WPP Group PLC**, London	1,584	1,328	19.3	10,580	8,913
3	2	**Interpublic Group of Cos.**, New York	1,279	1,215	5.2	8,532	8,107
4	3	**Omnicom Group**, New York	1,151	977	17.8	8,255	7,013
5	NA	**FCB-Publicis***, Chicago/Paris	632	601	5.2	4,210	4,008
6	6	**Eurocom**, Paris	476	NA	NA	3,314	NA
7	8	**Lowe Group PLC**, London	200	173	15.6	1,365	1,166
8	9	**BJK&E**, New York	182	173	5.2	1,302	1,207
9	NA	**BDDP Group**, Paris	96	56	72.1	637	370
10	11	**Lopex PLC**, London	84	67	25.4	566	452
11	10	**GGK Holding AG**, Basel	80	82	(2.4)	550	554
12	7	**WCRS Group PLC**, London	58	NA	NA	441	NA
13	NA	**Gold Greenlees Trott**, London	56	NA	NA	398	NA

Notes: Dollars are in millions. * represents a combination of all of Foote, Cone & Belding Communications, Chicago & Publicis S.A., Paris.

Mega-groups by worldwide gross income

Rank 1989	Rank 1988	Group	Gross income Worldwide 1989	Gross income Worldwide 1988	% chg	Gross income U.S. 1989	Gross income U.S. 1988	% chg	Billings Worldwide 1989	Billings Worldwide 1988	Billings U.S. 1989	Billings U.S. 1988
1	3	**WPP Group PLC**, London	$2,404	$2,038	18.0	$1,243	$1,031	20.6	$16,052	$13,528	$8,347	$6,958
2	1	**Saatchi & Saatchi PLC**, London	2,300	1,990	15.6	1,136	921	23.3	15,753	13,529	7,954	6,316
3	2	**Interpublic Group of Cos.**, New York	1,355	1,260	7.5	480	464	3.4	9,035	8,402	3,200	3,095
4	4	**Omnicom Group**, New York	1,210	986	22.7	677	585	15.7	8,645	7,072	5,042	4,344
5	NA	**FCB Publicis**, Chicago/Paris	689	653	5.5	281	274	2.5	4,599	4,358	1,871	1,826
6	6	**Eurocom**, Paris	507	NA	NA	60	NA	NA	3,432	NA	497	NA
7	7	**WCRS Group PLC**, London	280	336	(16.6)	75	100	(24.8)	4,215	2,914	525	764
8	8	**Lowe Group PLC**, London	230	195	17.9	83	60	38.3	1,5[illegible]	1,316	555	404
9	9	**BJK&E**, New York	201	188	6.9	166	159	4.4	1,475	1,347	1,240	1,154
10	11	**Lopex PLC**, London	161	126	27.6	68	64	6.3	1,071	840	11	10
11	NA	**BDDP Group**, Paris	119	75	58.6	0	NA	NA	791	499	NA	NA
12	10	**GGK Holding AG**, Basel	82	85	(3.5)	26	561	(95.3)	570	188	181	NA
13	NA	**Gold Greenlees Trott**, London	67	NA	NA	20	NA	NA	470	NA	154	NA

Notes: Dollars are in millions. Only a groups' percentage ownership of agencies is included in its total.

Staff for this issue

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Making equity equitable

HDM and multiple owners are best example of change

HDM Worldwide falls prey to *Advertising Age's* new method of compiling the world's Top 100 agencies.

HDM is a big agency. Strong in the U.S., it is even more powerful on the international front. HDM's problem is that it does not own itself.

To be ranked among the world's Top 100, an agency must hold at least 50% of its equity that is not held by other agencies on the same list. If it owns less, its billings fall into those of the parent agency based on the percentage the parent holds in the subsidiary. This procedure is to prevent double-dipping whereby a subsidiary claims itself and the parent's consolidated totals do likewise.

HDM has three parents—Eurocom, the French holding company; Dentsu Inc.; and Young & Rubicam. They hold varying equity percentages depending on four global regions: In all, Dentsu walks away with 27% of HDM's worldwide returns, Y&R with 32% and Eurocom, 41%.

Eurocom's cut is larger than the rest because of its weighted share in Europe—HDM's biggest theater of operations where Eurocom takes 51%.

Though missing on the world's Top 100 chart, HDM agencies nonetheless appear in the international country rankings *(beginning on Page S-24)*. HDM also ranks No. 35 on the U.S. Top 100, because Y&R only claims 30% of its U.S. total, leaving 70% of U.S. billings unclaimed by any other agency on the U.S. chart.

RANK: NR

HDM Worldwide
New York
Gross income: **$368.0** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	368.0	263.6	39.6
Volume	2,555.5	1,858.0	37.5
U.S.			
Gross income	30.3	28.6	5.9
Volume	247.3	228.9	8.0

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	3,387	2,528	33.9
Offices	103	62	66.1

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
HDM, New York	247.3
HDM Direct, Los Angeles	NA
Stone & Adler, Chicago	NA
Castellanos Latina, Los Angeles(NE)	NA

Non-U.S. offices, location	Billings
HDM, Bangkok(MJ)	14.1
HDM, Kuala Lumpur(MJ)	14.8
HDM Belgium, Brussels(MJ)	60.1
HDM Dorland, Vienna(MN)	28.4
HDM DSH K.K., Tokyo(MJ)	17.7
HDM Exit Oy, Helsinki(MN)	16.0
HDM France, Paris(MJ)	728.4
HDM Germany, Duesseldorf(MJ)	260.5
HDM Group, Copenhagen(MJ)	24.8
HDM Hong Kong, Hong Kong(MJ)	45.5
HDM Korea, Seoul(JV)	NA
DM KK Japan, Tokyo(MJ)	291.5
HDM London, London(MJ)	108.8
HDM Marketing Kommunikation, Zurich(MJ)	65.2
HDM Mattingly, Melbourne(MJ)	168.1
HDM Mattingly, Auckland(NA)	24.0
HDM Portugal, Lisbon(MJ)	9.1
HDM Singapore, Singapore(MJ)	15.9
HDM Shanghai, Shanghai(MJ)	NA
HDM Spain, Madrid(MJ)	114.2
HDM Taiwan, Taipei(MJ)	5.1
HDM WE, Milan(MJ)	62.0
HDM-Alcantara, Manila(MN)	11.8
HDM/DYR Advertising, Beijing(MJ)	3.5
HDM/Falmar, Istanbul(MN)	3.3
HDM/MK, Stockholm(MJ)	27.4
HDM/VW&A Advertising, Rotterdam(MJ)	34.9
Target Advertising, Athens(MN)	5.1

Annual review

HDM's international billings grew a dramatic 41.6%, led by its European operations where more than half of its billings emanate. New accounts in Europe included the $15 million EuroDisneyland prelaunch and Sony Corp.'s first pan-European advertising as well as Sara Lee's Douwe Egberts division oral care and detergents in Europe while it lost Beiersdorf AG's Cosmed division in European account consolidation. In the U.S., HDM became the first agency for the Fries Entertainment theatrical distribution account ($5-$10 million), it gained Federal Express international air services ($7-$9 million), Acapulco, Mexico area-hotel group tourism ($10 million), which helped offset the loss of Hewlett-Packard ($13 million). In early 1989 HDM Mattingly, Sydney, was formed as a joint venture between HDM and Mojo-Monohan Dayman Adams Group, a group formed in 1985 that was being dissolved after Mojo merger with Chiat/Day in 1989. In keeping with its plan to expand beyond traditional advertising, HDM Direct Marketing Group was formed in early 1989 as an umbrella company for HDM direct-response shops in Los Angeles, New York, Boston, Paris, Hong Kong and new acquisitions, including Stone & Adler in Chicago. In April, HDM Worldwide opened a Shanghai office, it second in China. Later it signed a non equity affiliate agreement with Hispani marketing agency Castellanos Latina Los Angeles. HDM Korea was opened i December as a joint venture with Oricon Co., Seoul, and was expected to bill $ million in its first year. HDM Worldwid is owned 40.8% by Eurocom, 32.1% b Y&R and 27.1% by Dentsu. Those por tions are included in each parent's re sults.

U.S. accounts

Gained: LA—Acapulco Tourism Board Federal Express, Los Cabos Tourism Board; NY—Christian Dior perfumes Citizen Watch; HDB WW Direct, LA— Pacific Bell Directory, Businessland Stone & Adler, Chicago—Navistar Financial, American Trucking Assn.

Lost: NY—Orangina.

International accounts

Gained: Air New Zealand—Auckland Sydney; Credit Suisse—Taiwan; Eur Disney—London, Paris; Federal Express —Hong Kong, Singapore, Taiwan; Her —Barcelona, Italy, Rotterdam, Tokyo Hewlett-Packard—Beijing, Barcelona Israeli Tourism—Barcelona; Jacobs Suchard—Taiwan; NEC—Hong Kong Kuala Lumpur; Sara Lee—Brussels London, Madrid, Rotterdam, Melbourne Warner-Lambert—Manila, Bangkok.

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U.S. Agency of the Year

SF's Goodby, Berlin & Silverstein hailed

Agency's style: freshness, wit, warmth

By Alice Z. Cuneo

Goodby, Berlin & Silverstein, just 7 years old and still, as one of its founders put it, "a David among Goliaths," is *Advertising Age's* Agency of the Year for 1989.

The first San Francisco agency to win the honor, Goodby beat out runners-up Ammirati & Puris, New York, and Wieden & Kennedy, Portland, Ore. *(see Page S-53).*

The agency bills $40 million annually, and its work has won high praise. Despite that, it lacks a high-profile national account—its first national commercial, for H.J. Heinz Co.'s Skippy Premium dog food, ran last October.

"They have an excellent creative product," said Hal Riney, chairman of Hal Riney & Partners and spiritual father of Goodby. The agency's principals—Jeff Goodby, 39; Andy Berlin, 40; and Rich Silverstein, 40—all worked for Mr. Riney at Ogilvy & Mather in San Francisco before forming their own shop.

Goodby claims not to have an agency "style." Its work is consistent only in its unexpected freshness, typically accomplished with wit and warmth.

To boost awareness of the University of California at San Francisco—and overcome neighborhood opposition to expansion plans—the agency dressed a real-life expert on parasitic diseases, the university's C.C. Wang, in hockey goalie gear and showed him flailing futilely at puck after puck.

As the shellshocked scientist crawls off the ice, voice-over says the university might be better-known if it had good sports teams, and the tagline flashes on the screen: "125 years and still no sports."

Commercials for Supercuts, a hair salon chain, never mention stylish hair but powerfully suggest the romantic possibilities it affords.

In one spot, a young man at a wedding reception is unable to hide his surprise—and delight—at a buddy's suddenly grown-up kid sister.

Noticing his interest, she tosses her magnificent long hair back and gives him a knowing look. "Supercuts" shows briefly on the screen.

Goodby's b&w commercials for the *San Francisco Examiner* were probably the first to signal the agency was bringing something new to the party.

One execution in the long-running campaign depicts "Wild Will Hearst," the newspaper's publisher, recklessly driving an *Examiner* delivery truck over the hills of the city.

The suspense builds, Hitchcocklike, as the commercial cuts between speeding truck and a little old lady who's dropped a quarter precisely in its path and is bending to pick it up.

The truck arrives, swooshing right at her. In the next frames, she's holding an *Examiner* as Mr. Hearst smugly flips the quarter in his hand.

Goodby's most elegant work has been for the upscale Royal Viking Cruise Line. For the campaign's print ads, Mr. Silverstein paged through old typography books until he found a typeface that would evoke what he called "the art of cruising in the '40s."

"It isn't just pretty," he said. "It enhances the product."

Much of the agency's print work exhibits an unusual sensitivity to type, most notably in ads for the Australian Lamb Council and the Nature Co.

In a recent roundtable discussion on agencies' use of computers (AA, March 12), Mr. Silverstein said: "I don't want to be limited to what typefaces are on a machine. I have a great reverence for type."

For a campaign for Polaroid Corp.'s Cool Cam, an instant camera for teen-agers, Goodby shot impromptu teen endorsements of the camera.

One of the spots, of a young man wearing a battered pair of glasses and delivering his Southern-accented pitch as the camera tries in vain to keep him in frame, is now on the Goodby reel.

"We like to be spontaneous with the work—to get at things before people overthink them, to get at their initial, instinctive emotions," Mr. Goodby said. "That's why we use a lot of raw footage and a lot of humor."

The Goodby principals decided to create an agency—"an environ-

(Continued on Page S-53)

A wedding, an airport, a school and a kitchen are settings for soft-sell SuperCuts spots.

Call the Oakland SPCA

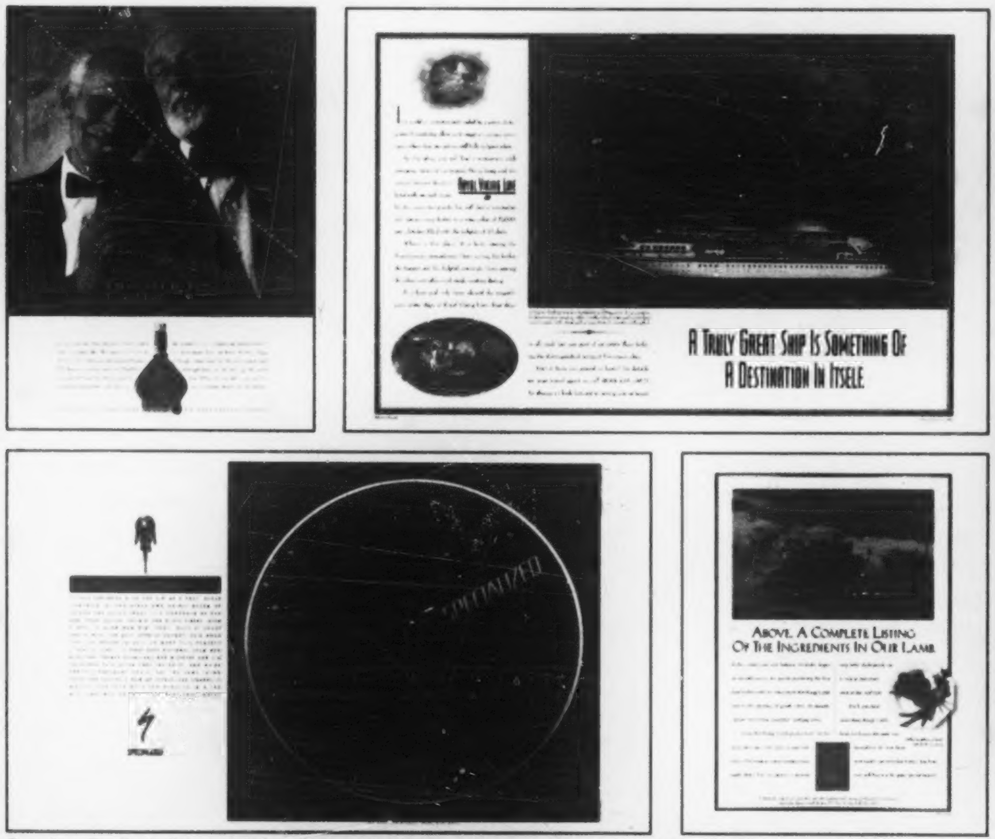
Toby, the neighborhood canine Lothario, stars in a humorous "get your dog fixed" SPCA message.

SKIPPY
PREMIUM

Stains on an upstairs rug may be his but the pet still deserves Skippy Premium, this spot says.

125 YEARS
AND STILL
NO SPORTS
UC
SAN FRANCISCO

A professor's futility as goalie humorously explains why UCSF doesn't field sports teams.

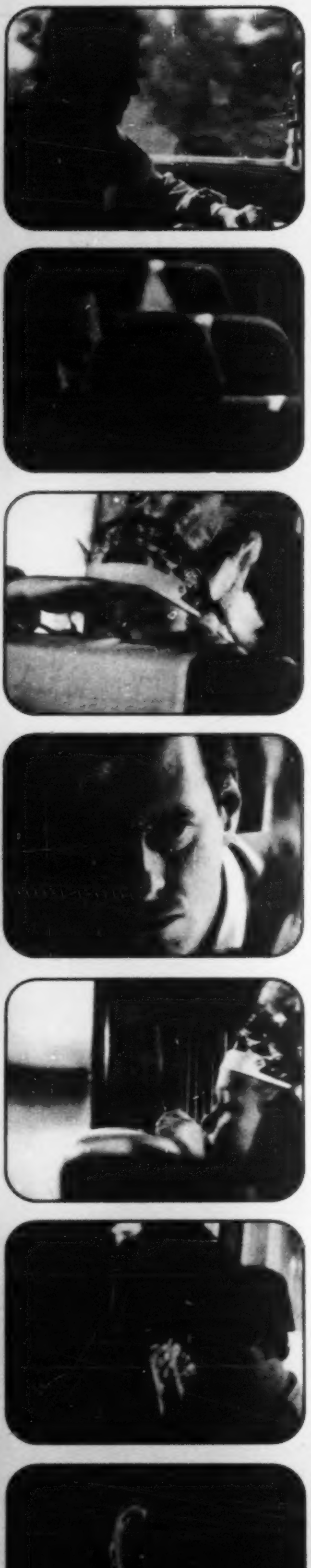

ROYAL VIKING LINE
A TRULY GREAT SHIP IS SOMETHING OF A DESTINATION IN ITSELF
SPECIALIZED
ABOVE, A COMPLETE LISTING OF THE INGREDIENTS IN OUR LAMB

Goodby, Berlin & Silverstein's print ads include a wide variety of executions and illustrate Creative Director Rich Silverstein's use of an array of different typefaces to enhance the mood of the ads.

International Agency of the Year

Contrapunto engineers locomotion to top spot

Surprises tell Spanish success story



A game of Cowboys and Indians offers viewers a first-class ride to the Wild West aboard this 45-second TV spot for state-run railroad RENFE.

By Marina Specht

Storytelling abilities and surprise endings are some of the creative techniques that earned for Spain's Contrapunto the title of *Advertising Age* International Agency of the Year for 1989.

After two straight years as a runner-up, the Madrid-based shop was selected from 51 agencies in 19 countries.

A prime example of the Spanish agency's ability to capture a TV viewer's attention with a well-told tale is a commercial for the Spanish state railway, RENFE.

The commercial opens with a well-dressed business executive riding on a train. His work is interrupted, however, when a boy with an Indian headdress suddenly appears from behind the seat and pretends to shoot an imaginary arrow at the businessman, who playacts as a cowboy.

The man plays dead until the conductor wants his ticket.

It's only after almost 45 seconds that TV viewers realize they're seeing a commercial for the railway.

The agency's ads often make use of simple plots, superb photography and strong, straightforward copy.

These techniques are used for products and services as diverse as shoe polish from Reckitt & Colman, a hair-removing device from Protecno's Epilady and government social programs.

"Our only philosophy is to surprise [the viewer], always," said Juan Mariano Mancebo, 38, who shares the post of chief creative director at Contrapunto with Jose Maria Lapena, 37.

Contrapunto's ability to surprise viewers gained international attention last year with a campaign for the state-owned TV network TVE intended to urge Spaniards not to watch too much TV. The 2-year-old campaign won the Grand Prix at the 1989 International Advertising Film Festival in Cannes.

The protagonist of two heart-tugging spots is a dog named Pippin, who unsuccessfully tries to convince his young master to leave the TV and play. The pup runs away from home, clutching his suitcase, in one of the commercials.

"When the campaign ended, thousands of people called the TVE headquarters to find out what happened to the dog," said Teo Marcos, 47, president and co-founder of the 15-year-old agency, a BBDO Worldwide affiliate.

The agency responded to the outcry with a third spot that evoked the same emotions and reinforced the shop's reputation for creativity.

In "Christmas Card," Pippin hangs out in a bar after closing time on Christmas Eve. Sitting on a stool, next to his suitcase, the dog sadly rejects delicious pastries and responds only when the bartender sits down at the piano. The two play "Silent Night" together in the empty bar.

"The ads [were] so popular that a lot of Spanish companies started using the dog's name and image to sell anything from clay figures and toys to T-shirts," Mr. Mancebo said.

The future of the Pippin saga depends on whether Contrapunto keeps the account, now undergoing its annual review.

If the account leaves, it wouldn't be the first time Contrapunto lost advertising business despite high-quality creative work.

On Jan. 1, Contrapunto lost a major piece of business when U.K.-based Reckitt & Colman decided to realign most of its business worldwide with Saatchi & Saatchi Advertising, Young & Rubicam and BDDP Group. Contrapunto lost $3.8 million in Reckitt business.

"Leaving Contrapunto was a pity; they knew our brands well, and they understood the spirit of our company," said Manuel Suarez, Reckitt marketing director in Spain.

One of the agency's last pieces of work for the household products marketer was a TV spot for Nugget shoe polish.

As classical music plays, various colors of creamy shoe polish are spread on a canvas. The end result is a beautiful abstract

(Continued on Page S-53)

A grandma on the go is featured in this TV spot for the National Institute for Social Affairs.

HISTORIAS DEL TREN
HISTORIAS DEL TREN

Love rides the rails in these ads, themed the "Tale of the train." On the left, gloves, a photo and a lock of hair keep the romantic encounter fresh, while on the right, a photo and flowers tug at the heartstrings.

ENTENDER MEJOR
LA
UNTOS

"Off with her head" is the battle cry for this clever *El Pais* newspaper ad with mail-in coupon.

The point of this ad for Protecno's Epilady isn't fuzzy as the fruit remains intact.

POR LA VIA RAPIDA
RENFE

Simplicity quickly offers a memorable print ad, themed "For the fast way," for state-run railroad RENFE.

Top 100 agencies worldwide by gross income

		Worldwide gross income			Worldwide billings			U.S. gross income			U.S. billings		
Rank	Agency, headquarters	1989	1988	% chg	1989	1988	% chg	1989	1988	% chg	1989	1988	% chg
1	**Dentsu Inc.**, Tokyo	$1,316.4	$1,176.2	11.9	$10,063.2	$8,939.3	12.6	NA	NA	NA	NA	NA	NA
2	**Saatchi & Saatchi Advertising Worldwide**, New York	890.0	740.5	20.2	6,049.9	5,053.9	19.7	$395.2	$326.3	21.1	$2,778.9	$2,209.6	25.8
3	**Young & Rubicam**, New York	865.4	757.6	14.2	6,250.5	5,390.3	16.0	409.5	372.8	9.9	3,114.8	2,791.8	11.6
4	**Backer Spielvogel Bates Worldwide**, New York	759.8	689.8	10.2	5,143.2	4,677.9	9.9	310.7	282.7	9.9	2,158.0	1,964.2	9.9
5	**McCann-Erickson Worldwide**, New York	715.5	656.8	8.9	4,772.3	4,381.0	8.9	209.1	197.0	6.1	1,394.8	1,314.0	6.1
6	**Ogilvy & Mather Worldwide**, New York	699.7	635.2	10.1	4,828.0	4,110.1	17.5	305.1	281.1	8.6	2,104.4	1,874.9	12.2
7	**BBDO Worldwide**, New York	656.6	585.9	12.1	4,550.0	4,051.2	12.3	373.6	340.5	9.7	2,656.0	2,414.3	10.0
8	**J. Walter Thompson Co.**, New York	626.4	559.3	12.0	4,407.5	3,857.5	14.3	266.5	257.5	3.5	1,851.0	1,787.9	3.5
9	**Lintas:Worldwide**, New York	593.3	537.6	10.4	3,957.6	3,585.6	10.4	224.9	201.7	11.5	1,499.9	1,345.4	11.5
10	**Hakuhodo Inc.**, Tokyo	585.5	522.2	12.1	4,449.2	3,939.1	12.9	NA	NA	NA	NA	NA	NA
11	**DDB Needham Worldwide**, New York	552.9	399.9	38.2	4,095.4	3,020.3	35.6	302.9	244.4	24.0	2,386.3	1,929.3	23.7
12	**Foote, Cone & Belding Communications**, Chicago*	510.9	483.9	5.6	3,413.9	3,242.5	5.3	280.5	273.7	2.5	1,871.2	1,825.8	2.5
13	**Grey Advertising**, New York	498.9	432.8	15.3	3,267.4	2,886.5	13.2	240.7	227.9	5.6	1,605.3	1,520.3	5.6
14	**Leo Burnett Co.**, Chicago	483.8	428.4	12.9	3,245.5	2,865.1	13.3	288.8	263.4	9.6	1,945.3	1,765.0	10.2
15	**D'Arcy Masius Benton & Bowles**, New York	471.5	428.7	10.0	3,803.1	3,360.8	13.2	232.3	209.6	10.8	2,055.3	1,794.2	14.6
16	**EWDB Worldwide**, Paris	381.0	NA	NA	2,702.3	NA	NA	82.4	NA	NA	684.0	NA	NA
17	**Publicis-FCB Communications B.V.**, Paris **(49% FCB)**	358.8	337.0	6.5	2,405.4	2,278.6	5.6	4.3	2.7	61.0	31.7	19.0	66.8
18	**N W Ayer Inc.**, New York	210.5	185.2	13.6	1,398.2	1,347.7	3.7	128.8	127.8	0.8	859.1	946.7	(9.3)
19	**Bozell Inc.**, New York	190.7	179.2	6.4	1,400.0	1,283.0	9.1	155.4	150.3	3.4	1,165.0	1,090.0	6.9
20	**RSCG**, Paris	175.3	151.6	15.7	1,234.3	1,128.2	9.4	27.3	18.2	49.6	216.8	151.9	42.7
21	**Tokyu Agency**, Tokyo	156.2	134.6	16.0	1,259.4	1,115.2	12.9	NA	NA	NA	NA	NA	NA
22	**Dai-Ichi Kikaku**, Tokyo	155.8	141.9	9.8	1,053.0	977.7	7.7	NA	NA	NA	NA	NA	NA
23	**Daiko Advertising**, Osaka, Japan	152.1	139.7	8.9	1,214.1	1,126.7	7.8	NA	NA	NA	NA	NA	NA
24	**Chiat/Day/Mojo**, Venice, Calif.	150.0	110.0	36.4	1,060.0	838.0	26.5	106.0	77.0	37.7	785.0	603.5	30.1
25	**Lowe International**, London*	137.8	NA	NA	918.6	NA	NA	42.0	NA	NA	279.9	NA	NA
26	**Wells, Rich, Greene**, New York*	132.5	125.1	5.9	885.0	835.9	5.9	132.5	125.1	5.9	883.0	833.9	5.9
27	**Scali, McCabe, Sloves**, New York	127.0	107.0	18.7	870.1	770.6	12.9	79.0	71.8	9.9	590.3	559.7	5.5
28	**TBWA Advertising**, New York	123.7	97.4	27.0	827.0	671.9	23.1	33.2	23.1	43.8	221.6	154.1	43.8
29	**Ketchum Communications**, Pittsburgh	117.8	109.9	7.1	915.7	776.0	18.0	112.9	102.1	10.6	854.9	726.0	17.7
30	**Asatsu Inc.**, Tokyo	113.9	102.7	10.8	837.3	740.4	13.1	NA	NA	NA	NA	NA	NA
31	**Yomiko Advertising**, Tokyo	100.3	90.0	11.5	753.5	660.3	14.1	NA	NA	NA	NA	NA	NA
32	**Ross Roy Group**, Bloomfield Hills, Mich.	97.7	85.2	14.6	651.1	568.1	14.6	97.7	85.2	14.6	651.1	568.1	14.6
33	**I&S Corp.**, Tokyo	94.7	83.2	13.9	770.2	692.9	11.2	NA	NA	NA	NA	NA	NA
34	**MPM Propaganda**, Sao Paulo	83.9	NA	NA	220.7	NA	NA	NA	NA	NA	NA	NA	NA
35	**Asahi Advertising**, Tokyo	82.9	70.7	17.3	509.4	440.3	15.7	NA	NA	NA	NA	NA	NA
36	**BDDP**, Paris	79.2	69.3	14.2	527.9	462.5	14.2	NA	NA	NA	NA	NA	NA
37	**Cheil Communications**, Seoul	64.0	44.7	43.1	247.5	194.1	27.5	NA	NA	NA	NA	NA	NA
38	**Nihon Keizaisha Advertising**, Tokyo	56.3	47.1	19.6	337.3	283.0	19.2	NA	NA	NA	NA	NA	NA
39	**W.B. Doner**, Southfield, Mich.	52.1	41.9	24.4	381.0	303.3	25.6	44.2	37.0	19.4	309.0	268.7	15.0
40	**Clemenger/BBDO**, Melbourne **(46.46% BBDO)**	52.0	43.1	20.8	325.1	269.2	20.8	NA	NA	NA	NA	NA	NA
41	**Hill, Holliday, Connors, Cosmopulos**, Boston	51.6	50.2	2.7	344.0	335.0	2.7	43.9	43.1	2.0	293.1	287.4	2.0
42	**Chuo Senko Advertising**, Tokyo	50.6	47.0	7.6	376.4	345.8	8.9	NA	NA	NA	NA	NA	NA
43	**Armando Testa Group Worldwide**, Milan	50.2	47.7	5.2	349.4	323.4	8.1	NA	NA	NA	NA	NA	NA
44	**Sogei Co.**, Tokyo	49.2	39.2	25.7	300.2	263.0	14.2	NA	NA	NA	NA	NA	NA
45	**Orikomi Advertising**, Tokyo	47.5	40.8	16.3	435.8	419.9	3.8	NA	NA	NA	NA	NA	NA
46	**Oricom Inc.**, Seoul	45.1	32.5	38.8	173.0	137.0	26.3	NA	NA	NA	NA	NA	NA
47	**Admarketing Inc.**, Los Angeles	44.9	40.4	11.1	252.0	224.5	12.2	44.9	40.4	11.1	252.0	224.5	12.2
48	**FCA! Group**, Paris	42.3	NA	NA	281.7	NA	NA	NA	NA	NA	NA	NA	NA
49	**Man-Nen-Sha Inc.**, Osaka	42.2	36.4	15.9	550.4	492.9	11.7	NA	NA	NA	NA	NA	NA
50	**Telephone Marketing Programs**, New York	40.5	31.4	29.1	270.0	209.2	29.1	37.8	29.6	27.9	252.1	197.1	27.9
51	**Earle Palmer Brown**, Bethesda, Md.	40.1	36.2	10.8	310.5	271.1	14.5	40.1	36.2	10.8	310.5	271.1	14.5
52	**Collett Dickenson Pearce**, London	39.1	31.9	22.5	269.6	216.1	24.7	NA	NA	NA	NA	NA	NA
53	**Jordan, McGrath, Case & Taylor**, New York	38.5	38.5	0.0	315.0	300.0	5.0	38.5	38.5	0.0	315.0	300.0	5.0
54	**Almap/BBDO**, Sao Paulo **(19.9% BBDO)**	38.0	NA	NA	144.1	NA	NA	NA	NA	NA	NA	NA	NA
55	**Nihon Keizai**, Tokyo	37.2	29.6	25.6	254.8	211.5	20.5	NA	NA	NA	NA	NA	NA
56	**Levine, Huntley, Schmidt & Beaver**, New York	37.1	32.1	15.7	250.3	216.4	15.7	37.1	32.1	15.7	250.3	216.4	15.7
57	**Ally & Gargano**, New York	37.0	34.4	7.6	316.0	295.2	7.0	37.0	34.4	7.6	316.0	295.2	7.0
58	**Kyodo Advertising**, Tokyo	35.3	35.4	(0.1)	265.6	270.0	(1.6)	NA	NA	NA	NA	NA	NA
59	**Tokyu Agency International**, Tokyo **(24.5% DMB&B)**	34.9	30.3	15.0	272.4	233.5	16.7	NA	NA	NA	NA	NA	NA
60	**Laurence, Charles, Free & Lawson**, New York	34.6	41.5	(16.5)	275.2	302.0	(8.9)	34.6	41.5	(16.5)	275.2	302.0	(8.9)
61	**Duailibi Petit Zaragoza Propaganda**, Sao Paulo	34.6	NA	NA	139.6	NA	NA	NA	NA	NA	NA	NA	NA
62	**Hal Riney & Partners**, San Francisco*	33.8	23.0	46.7	225.0	200.0	12.5	33.8	23.0	46.7	225.0	200.0	12.5
63	**Meitsu Inc.**, Tokyo	32.0	31.0	3.2	213.1	193.5	10.1	NA	NA	NA	NA	NA	NA
64	**Nationwide Advertising Service**, Cleveland*	31.0	27.8	11.5	206.8	185.4	11.5	31.0	27.8	11.5	206.8	185.4	11.5
65	**Sanko-sha**, Tokyo	28.9	26.4	9.5	190.6	174.1	9.5	NA	NA	NA	NA	NA	NA
66	**Cossette Communications-Marketing**, Toronto	28.3	21.0	34.5	180.7	136.6	32.2	NA	NA	NA	NA	NA	NA
67	**Italia/BBDO**, Milan **(40% BBDO)**	27.7	25.4	8.9	184.2	169.4	8.7	NA	NA	NA	NA	NA	NA
68	**Abbott Mead Vickers, SMS**, London	25.8	23.6	8.9	194.4	177.6	9.4	NA	NA	NA	NA	NA	NA
69	**Direct Marketing Group**, New York	25.7	26.1	(1.5)	149.6	152.9	(2.2)	25.7	26.1	(1.5)	149.6	152.9	(2.2)
70	**Warwick Baker & Fiore**, New York	25.5	24.0	6.3	170.0	160.0	6.3	25.5	24.0	6.3	170.0	160.0	6.3
71	**Gold Greenlees Trott PLC**, London	24.4	22.1	10.4	164.4	142.6	15.3	NA	NA	NA	NA	NA	NA
72	**Norton Publicidade**, Sao Paulo	24.2	NA	NA	96.8	NA	NA	NA	NA	NA	NA	NA	NA
73	**L.G. Ad**, Seoul	24.1	19.0	26.6	160.7	126.9	26.6	NA	NA	NA	NA	NA	NA
74	**Evans Communications**, Salt Lake City	24.0	22.1	8.5	160.0	147.5	8.5	24.0	22.1	8.5	160.0	147.5	8.5
75	**Allen Brady & Marsh**, London*	23.8	22.5	5.7	158.4	149.9	5.7	NA	NA	NA	NA	NA	NA
76	**Dailey & Associates**, Los Angeles	23.3	19.6	18.4	155.2	131.0	18.4	23.3	19.6	18.4	155.2	131.0	18.4
77	**Austin Knight**, London*	23.0	19.1	20.4	153.6	127.6	20.4	NA	NA	NA	NA	NA	NA
78	**McKim Advertising**, Toronto	22.6	22.1	2.7	151.1	147.2	2.6	NA	NA	NA	NA	NA	NA
79	**Griffin Bacal**, New York	22.4	20.0	12.0	176.2	155.8	13.1	20.7	18.4	12.3	162.7	143.9	13.1
80	**Salles/Inter-Americana**, Sao Paulo	22.0	NA	NA	109.9	NA	NA	NA	NA	NA	NA	NA	NA
81	**ARC Advertising**, London*	21.6	13.8	56.3	144.0	92.1	56.3	NA	NA	NA	NA	NA	NA
82	**Bartle Bogle Hegarty**, London	21.4	19.0	12.8	159.2	126.7	25.7	NA	NA	NA	NA	NA	NA
83	**Keller-Crescent Co.**, Evansville, Ind.	21.3	22.0	(3.4)	106.5	110.3	(3.4)	21.3	22.0	(3.4)	106.5	110.3	(3.4)
84	**Yellowhammer Advertising**, London	21.3	17.4	22.4	141.8	115.9	22.4	NA	NA	NA	NA	NA	NA
85	**CFP Alliance**, Paris	21.2	20.3	4.3	141.1	136.1	3.6	NA	NA	NA	NA	NA	NA
86	**Nambokusha Inc.**, Tokyo	20.8	15.2	37.2	165.2	117.2	40.9	NA	NA	NA	NA	NA	NA
87	**Neville Jeffress Advertising**, Sydney	20.8	16.6	25.6	138.5	110.7	25.1	NA	NA	NA	NA	NA	NA
88	**Thomas G. Ferguson Associates**, Parsippany, N.J.	20.6	16.9	22.1	120.7	102.1	18.2	20.6	16.9	22.1	120.7	102.1	18.2
89	**GSD&M**, Austin, Texas	20.2	15.3	32.1	150.8	124.1	21.5	20.2	15.3	32.1	150.8	124.1	21.5
90	**Alliance International U.K.**, London	20.1	20.7	(3.1)	133.9	138.2	(3.1)	NA	NA	NA	NA	NA	NA
91	**Bloom Cos.**, Dallas	20.0	22.1	(9.5)	168.2	182.6	(7.9)	20.0	22.1	(9.5)	168.2	182.6	(7.9)
92	**Wyse Advertising**, Cleveland	19.9	15.7	26.5	140.4	105.8	32.8	19.9	15.7	26.5	140.4	105.8	32.8
93	**Geer, DuBois**, New York	19.5	18.0	8.3	130.0	120.0	8.3	19.5	18.0	8.3	130.0	120.0	8.3
94	**Rosenfeld, Sirowitz, Humphrey & Strauss**, New York	19.1	17.4	9.5	127.0	116.0	9.5	19.1	17.4	9.5	127.0	116.0	9.5
95	**Korad Ogilvy & Mather**, Seoul **(30% O&M)**	18.8	14.4	30.8	118.9	90.5	31.4	NA	NA	NA	NA	NA	NA
96	**Richards Group**, Dallas	18.7	15.1	24.3	125.1	101.4	23.4	18.7	15.1	24.3	125.1	101.4	23.4
97	**Osaka Yomiuri Advertising**, Osaka, Japan	18.5	16.2	14.0	142.1	124.6	14.0	NA	NA	NA	NA	NA	NA
98	**Standard Advertising**, Tokyo	18.1	17.7	2.2	146.0	138.4	5.5	NA	NA	NA	NA	NA	NA
99	**Baker Lovick Advertising**, Toronto **(49% BBDO)**	17.7	16.3	8.7	118.4	108.9	8.7	NA	NA	NA	NA	NA	NA
100	**Rubin Postaer & Associates**, Los Angeles	17.4	17.5	(0.6)	143.1	128.7	11.2	17.4	17.5	(0.6)	143.1	128.7	11.2

Notes: All figures are U.S. dollars and are in millions. Percentages and initials in parentheses indicate equity amounts included in other top agencies. See Page S-20 for methodology. * indicates that gross income and/or total volume figures are AA estimates. Profiles of the Top 100 agencies begin on Page S-33.

AA chart: Kevin Brown

Burnett retains top agency brand title

Leo Burnett Co. has held on to its U.S. "brand" billings lead for the second consecutive year, strongly ahead of new second-place agency, J. Walter Thompson.

Burnett, holding one of the top two spots during all six years of *Advertising Age's* brand competition, extended its lead to $159.3 million, well above its $24.9 million first-place margin last year over Saatchi & Saatchi, whose prior year totals are skewed because of new "brand" computing methodology.

The *Ad Age* "brand" chart ranks agencies by pure advertising billings. As listed, these agencies are stripped of subsidiaries that have their own identity and/-or deal in specialties such as direct response, PR, research, pharmaceutical, sales promotion or Yellow Pages. In the past, billings from these specialties have been included in U.S. "brand" totals when such business was not claimed by an autonomous unit. This year, agencies were stripped of all non-pure advertising billings, such as direct response, despite the source of those billings.

However, some agencies do not include all subsidiaries in their U.S. totals. Exclusions in the accompanying chart list only units whose billings were absorbed in their reported U.S. totals.

Under this criteria, the brand often is the reduction of the agency to a single name in multiple cities handling only advertising. This process allows subsidiaries to stand on their own and parent agencies to be more fairly compared.

The specialty units or subsidiaries were eliminated from the parent based on figures reported either by the subsidiary or parent for these operations. When billings totals could not be obtained from the shops, they were estimated by *Ad Age*. Prior-year figures have been adjusted to reflect the agency composition in 1989.

In this era of megamergers, reduction to brands provides advertisers with a better understanding of the agencies' family trees as they continue to branch out. The brand agency concept is controversial among the multi-layered agencies, of course, because they are seeking to become "seamless," though separate identities are maintained in the case of some subsidiaries.

In terms of consolidated U.S. billings, Young & Rubicam continues to rank No. 1 on the *Ad Age* chart, but it slumped to No. 6 among the brands. Without its subsidiaries, Y&R's total U.S. billings were more than cut in half.

Among the Top 10 brands, Grey claimed the best percentage gain of 30.1%, and D'Arcy Masius Benton & Bowles, the second best at 19.3%. DMB&B in fact leaped from No. 9 to No. 4.

The largest decline hit Lord Geller Federico & Einstein, New York, which fell off the chart from No. 47 last year after experiencing a 65.6% drop in billings. LGFE in 1989 continued to be plagued by executive defections and loss of the IBM account in 1988. Doremus & Co. is the only other agency to lose its place among the Top 50 brand agencies, falling from No. 46 to No. 54 as its billings dropped 18.2%.

Sarah Polster

How the top 50 U.S. agency brands line up

Brand name agency rank 1989	1988	Agency	Agency group	U.S. brand billings 1989	1988	% chg	Total billings 1989
1	1	**Leo Burnett Co.**, Chicago		**$1,945.3**	$1,765.0	10.2	$1,945.3
2	3	**J. Walter Thompson Co.**, New York	WPP Group	**1,786.0**	1,721.5	3.7	1,851.0
3	2	**Saatchi & Saatchi Advertising**, New York	Saatchi & Saatchi Co. PLC	**1,706.3**	1,630.1	4.7	2,778.9
4	9	**D'Arcy Masius Benton & Bowles**, New York		**1,595.6**	1,337.3	19.3	2,055.3
5	4	**Foote, Cone & Belding Communications**, Chicago		**1,578.5**	1,517.4	4.0	1,871.2
6	5	**Young & Rubicam**, New York		**1,453.9**	1,528.5	(4.9)	3,114.8
7	11	**Grey Advertising**, New York		**1,434.1**	1,102.2	30.1	1,605.3
8	8	**Ogilvy & Mather Worldwide**, New York	WPP Group	**1,419.2**	1,240.9	14.4	2,104.4
9	6	**DDB Needham Worldwide**, New York	Omnicom Group	**1,316.5**	1,260.2	4.5	2,386.3
10	7	**McCann-Erickson Worldwide**, New York	Interpublic Group of Cos.	**1,299.8**	1,215.0	7.0	1,394.8
11	10	**BBDO Worldwide**, New York	Omnicom Group	**1,214.9**	998.7	21.6	2,656.0
12	12	**Backer Spielvogel Bates Worldwide**, New York	Saatchi & Saatchi Co. PLC	**1,177.8**	1,000.0	17.8	2,158.0
13	13	**Lintas:Worldwide**, New York	Interpublic Group of Cos.	**1,070.9**	966.1	10.8	1,500.0
14	15	**Bozell Inc.**, New York	Bozell, Jacobs, Kenyon & Eckhardt Inc.	**950.4**	900.0	5.6	1,165.0
15	17	**Wells Rich Greene**, New York		**883.0**	727.9	21.3	883.0
16	14	**N W Ayer**, New York		**859.1**	946.7	(9.3)	859.1
17	16	**Campbell-Mithun-Esty**, Minneapolis	Saatchi & Saatchi Co. PLC	**821.8**	748.4	9.8	859.8
18	18	**Della Femina McNamee EWDB**, New York	WCRS Group PLC	**728.7**	660.5	10.3	728.7
19	20	**Ketchum Communications**, Pittsburgh		**716.6**	625.6	14.5	854.9
20	19	**Chiat/Day/Mojo**, Venice, Calif.		**705.0**	556.5	26.7	785.0
21	21	**Tracy-Locke**, Dallas	Omnicom Group	**390.2**	380.7	2.5	404.6
22	22	**AC&R Advertising**, New York	Saatchi & Saatchi Co. PLC	**369.1**	355.6	3.8	369.1
23	24	**Scali, McCabe, Sloves**, New York	WPP Group	**318.5**	315.3	1.0	590.3
24	27	**Ally & Gargano**, New York		**311.0**	290.7	7.0	316.0
25	31	**W.B. Doner & Co.**, Southfield, Mich.		**300.1**	263.4	13.9	309.0
26	29	**Jordan, McGrath, Case & Taylor**, New York		**298.9**	284.6	5.0	315.0
27	25	**Lowe Marschalk**, New York	Interpublic Group of Cos.	**297.3**	305.0	(2.5)	297.3
28	26	**Laurence, Charles, Free & Lawson**, New York	Lowe Group PLC	**275.2**	302.0	(8.9)	275.2
29	33	**Earle Palmer Brown Cos.**, Bethesda, Md.		**269.5**	242.3	11.2	310.5
30	28	**Hill, Holliday, Connors, Cosmopulos**, Boston		**266.1**	267.0	(0.3)	293.1
31	32	**Wunderman Worldwide**, New York	Young & Rubicam	**262.4**	261.7	0.3	262.4
32	35	**Ogilvy & Mather Direct Response**, New York	WPP Group	**253.4**	226.0	12.1	305.0
33	43	**Telephone Marketing Programs**, New York		**252.1**	197.1	27.9	252.1
34	38	**Levine, Huntley, Schmidt & Beaver**, New York		**250.3**	216.4	15.7	250.3
35	23	**Ross Roy Inc.**, Bloomfield Hills, Mich.		**250.1**	254.7	(1.8)	651.1
36	36	**Admarketing**, Los Angeles		**232.7**	205.7	13.1	252.0
37	39	**HDM**, New York		**232.2**	215.7	7.6	247.3
38	37	**Tatham-Laird & Kudner**, Chicago		**230.1**	217.0	6.0	230.1
39	34	**Rapp Collins Marcoa**, New York	Omnicom Group	**226.0**	236.3	(4.4)	226.0
40	42	**Hal Riney & Partners**, San Francisco		**225.0**	200.0	12.5	225.0
41	50	**TBWA**, New York		**221.6**	154.1	43.8	221.6
42	40	**Ammirati & Puris**, New York	Omnicom Group	**220.0**	210.0	4.8	220.0
43	30	**McCaffrey & McCall**, New York	Saatchi & Saatchi Co. PLC	**219.2**	254.9	(14.0)	254.2
44	44	**Nationwide Advertising Service**, Cleveland		**206.8**	185.4	11.5	206.8
45	41	**Bernard Hodes**, New York	Omnicom Group	**203.1**	204.4	(0.6)	203.1
46	49	**Warwick Baker & Fiore**, New York	Lopex PLC	**170.0**	160.0	6.3	170.0
47	45	**Bloom Cos.**, Dallas		**168.2**	182.6	(7.9)	168.2
48	48	**Kallir Philips Ross**, New York	Omnicom Group	**168.0**	163.2	2.9	168.0
49	NR	**Griffin Bacal**, New York		**162.7**	143.9	13.1	162.7
50	NR	**Evans Communications**, Salt Lake City		**160.0**	147.5	8.5	160.0

Notes: Dollars are in millions. See table below for composition of ranked agencies. Prior year brand billings reflect agency's current composition.

Agency	Included	Excluded
Admarketing	Admarketing named shops	Admarketing direct response
Ally & Gargano	A&G named shops	A&G direct response; A&G Yellow Pages
Backer Spielvogel Bates Worldwide	BSB named shops	Campbell-Mithun-Esty, Custom Event Marketing, Kobs & Draft
BBDO Worldwide	BBDO named shops	Ammirati & Puris (50%); Baxter, Gurien & Mazzei; BBDO direct response; BBDO sales promotion; BBDO Yellow Pages; Blair Advertising; Caravetta Allen Kimbrough; Frank J. Corbett Inc.; Doremus & Co.; GM DuBois Corp.; Hannaford Co.; Ingalls, Quinn & Johnson; Lavey/Wolff/Swift; RC Communications; TELERx Marketing; Tracy-Locke; Rapp Collins Marcoa (50%)
Bozell	Bozell named shops	Bozell direct response, Bozell sales promotion, Bozell Yellow Pages, Custom Production Services, Robinson Lake Lerer & Montgomery
Earle Palmer Brown	EPB named shops	EPB direct response, EPB sales promotion, EPB Yellow Pages
Campbell-Mithun-Esty	C-M-E named shops	Cash Plus, Promotion Works
Chiat/Day/Mojo	C/D/M named shops	Anderson & Lembke, Perkins/Butler
D'Arcy Masius Benton & Bowles	DMB&B named shops	Clarion Marketing & Communications, DMB&B Direct, Intergroup Marketing & Promotions, Manning Selvage & Lee, Medicus Intercon
DDB Needham Worldwide	DDB Needham named shops	Ammirati & Puris (50%); Bernard Hodes Group; DDB Needham direct response; DDB Needham sales promotion; DDB Needham Yellow Pages; Kallir Philips Ross Inc.; Rapp Collins Marcoa (50%); Kresser, Craig/DIK; M/V/G DDB Needham; Elgin Syferd DDB Needham
W.B. Doner Inc.	W.B. Doner named shops	W.B. Doner direct response, W.B. Doner direct mail
Fahlgren & Swink	F&S named shops	Fahlgren & Swink Yellow Pages
Foote, Cone & Belding	FCB named shops, FCB Direct	Lewis, Gilman & Kynett; Albert Frank-Guenther Law; IMPACT; Waldstrom & Co.
Grey Advertising	Grey named shops	Beaumont-Bennett, Grey Direct
HDM	HDM named shops	HDM Direct Response
Hill, Holliday, Connors, Cosmopulos	HHCC named shops	HHCC sales promotion, HHCC direct response
Ketchum Advertising	Ketchum named shops	Botto Roessner Horne & Messinger, Difranza Williams Inc., Ketchum PR, Ketchum Yellow Pages, William A. Robinson Inc.
Lintas:Worldwide	Lintas: named shops	Fahlgren & Swink, Lintas Direct, Lintas Promo, Lintas Yellow Pages
McCaffrey & McCall	M&M named shops	McCaffrey & McCall Direct Response
McCann-Erickson Worldwide	M-E named shops, M-E Healthcare	McCann Direct; Phillips-Ramsey, Phoenix; Phillips-Ramsey, San Diego
Ogilvy & Mather Direct Response	O&M Direct Response, O&M Yellow Pages	A. Eicoff & Co., Targeted Communications Corp.
Ogilvy & Mather Worldwide	O&M named shops	O&M Direct Response, Adams & Rinehart
Ross Roy Group	Ross Roy named shops	Caiet Hirsch & Spector, Gray & Kilgore, Griswold Inc., Group 243, Ross Roy Direct, Ross Roy Promo, Wergeles & Drazen
Saatchi & Saatchi Advertising	S&S named shops	AC&R Advertising; Conill Advertising; Hoffman York Compton; Klemtner; McCaffrey & McCall; Rumrill-Hoyt; S&S Direct; Team One
Scali, McCabe, Sloves	SMS named shops	Fallon McElligott, Martin Agency
Tracy-Locke	T-L named shops	T-L direct marketing
J. Walter Thompson Co.	JWT named shops	Brouillard Communications
Young & Rubicam	Y&R named shops	Burson-Marsteller Worldwide; Cato Johnson Worldwide; Chapman Direct; Creswell, Munsell, Fultz & Zirbel; HDM USA (30%); Sive Associates; Sudler & Hennessey; Arthur Wilk; Wunderman Worldwide

U.S.-based agencies by domestic gross income

Rank				U.S. gross income			U.S. billings		U.S. employees			
1989	1988		Agency, headquarters	1989	1988	% chg	1989	1988	1989	1988	Top executive, title	Telephone
1	1	✓	**Young & Rubicam**, New York	409.5	372.8	9.9	3,114.8	2,791.6	4,066	4,717	Alexander Kroll, chmn, ceo	(212) 210-3000
2	3		**Saatchi & Saatchi Advertising Worldwide**, New York	395.2	326.3	21.1	2,778.9	2,209.6	1,760	1,975	O. Gossett/S. Upson, chmn	(212) 463-2000
3	2	✓	**BBDO Worldwide**, New York	373.6	340.5	9.7	2,656.0	2,414.3	3,375	3,598	Allen Rosenshine, chmn, ceo	(212) 459-5000
4	4		**Backer Spielvogel Bates Worldwide**, New York	310.7	282.7	9.9	2,158.0	1,964.2	1,370	1,322	Carl Spielvogel, chmn, ceo	(212) 297-7000
5	5	✓	**Ogilvy & Mather Worldwide**, New York	305.1	281.1	8.6	2,104.4	1,874.9	2,636	2,732	Graham Phillips, chmn, ceo	(212) 237-6000
6	9	✓	**DDB Needham Worldwide**, New York	302.9	244.4	24.0	2,386.3	1,929.3	3,025	2,786	Keith Reinhard, chmn, ceo	(212) 415-2000
7	7	✓	**Leo Burnett Co.**, Chicago	288.8	263.4	9.6	1,945.3	1,765.0	2,222	2,083	Hall Adams Jr., chmn, ceo	(312) 220-5959
8	6	✓	**Foote, Cone & Belding Communications**, Chicago*	280.5	273.7	2.5	1,871.2	1,825.8	2,832	3,081	Norman W. Brown, chmn, ceo	(312)-751-7000
9	8	✓	**J. Walter Thompson Co.**, New York	266.5	257.5	3.5	1,851.0	1,787.9	2,484	2,427	Burt Manning, chmn, ceo	(212) 210-7000
10	10	✓	**Grey Advertising**, New York	240.7	227.9	5.6	1,605.3	1,520.3	2,067	2,015	Edward H. Meyer, president, chmn	(212) 546-2000
11	11	✓	**D'Arcy Masius Benton & Bowles**, New York	232.3	209.6	10.8	2,055.3	1,794.2	2,341	2,288	John S. Bowen, chmn, ceo	(212) 468-3622
12	12	✓	**Lintas:Worldwide**, New York	224.9	201.7	11.5	1,499.9	1,345.4	1,781	1,917	William V. Weithas, chmn, ceo	(212) 605-8000
13	13	✓	**McCann-Erickson Worldwide**, New York	209.1	197.0	6.1	1,394.8	1,314.0	1,767	1,889	Robert L. James, chmn, president	(212) 697-6000
14	14	✓	**Bozell Inc.**, New York	155.4	150.3	3.4	1,165.0	1,090.0	1,643	1,665	Charles D. Peebler, ceo	(212) 727-5000
15	16		**Wells, Rich, Greene**, New York*	132.5	125.1	5.9	883.0	833.9	860	829	Mary Wells Lawrence, chmn, ceo	(212) 303-5050
16	15		**NW Ayer Inc.**, New York	128.8	127.8	0.8	859.1	946.7	980	1,337	Jerry J. Siano, president, ceo	(212) 474-5000
NR	NR		**Campbell-Mithun-Esty**, Minneapolis **(BSBW)**	115.9	105.6	9.8	859.8	783.0	1,155	1,227	William D. Dunlap, ceo	(612) 347-1000
17	17	✓	**Ketchum Communications**, Pittsburgh	112.9	102.1	10.6	854.9	726.0	1,229	1,360	William H. Genge, chmn, ceo	(412) 456-3500
18	20		**Chiat/Day/Mojo**, Venice, Calif.	106.0	77.0	37.7	785.0	603.5	935	812	Jay Chiat, chmn, ceo	(213) 314-5000
19	18	✓	**Ross Roy Group**, Bloomfield Hills, Mich.	97.7	85.2	14.6	651.1	568.1	1,046	955	Glen W. Fortinberry, chmn, ceo	(313) 433-6000
20	19		**Della Femina, McNamee EWDB**, New York	87.8	84.4	4.0	728.7	660.5	851	991	Jerry Della Femina, chmn, ceo	(212) 886-4100
21	21		**Scali McCabe Sloves**, New York	79.0	71.8	9.9	590.3	559.7	717	706	Marvin Sloves, chmn, ceo	(212) 735-8000
NR	NR	✓	**Tracy-Locke**, Dallas **(BBDO)**	55.6	54.5	1.9	404.6	408.0	625	654	Howard Davis, chmn, ceo	(214) 969-9000
NR	NR		**AC&R Advertising**, New York **(S&SAW)**	45.8	44.2	3.6	369.1	355.6	436	469	Stephen Rose, ceo, chmn	(212) 696-3900
22	25		**Admarketing Inc.**, Los Angeles	44.9	40.4	11.1	252.0	224.5	133	138	Jack Roth, president, ceo	(213) 203-8400
NR	NR	✓	**Ogilvy & Mather Direct Response**, New York **(O&M)**	44.2	41.0	7.8	305.0	272.0	488	471	Jerome W. Pickholz, chmn, ceo	(212) 237-6000
23	27		**W.B. Doner**, Southfield, Mich.	44.2	37.0	19.4	309.0	268.7	523	500	H.D. Fried, chmn, ceo	(313) 354-9700
24	22		**Lowe Marschalk**, New York	44.0	46.0	(4.3)	297.3	305.0	363	400	Andrew J. Langer, ceo	(212) 708-8800
25	23	✓	**Hill, Holliday, Connors, Cosmopulos**, Boston	43.9	43.1	2.0	293.1	287.4	408	421	George J. Hill III, chmn	(617) 437-1600
26	28		**Earle Palmer Brown**, Bethesda, Md.	40.1	36.2	10.8	310.5	271.1	469	446	Jeb Brown, ceo	(301) 657-6000
NR	NR	✓	**Wunderman Worldwide**, New York **(Y&R)**	38.7	39.9	(2.9)	262.4	266.1	352	295	Lester Wunderman, chmn	(212) 909-0100
27	26		**Jordan, McGrath, Case & Taylor**, New York	38.5	38.5	0.0	315.0	300.0	282	283	James J. Jordan Jr., chmn	(212) 326-9100
NR	NR		**McCaffrey & McCall**, New York **(S&SAW)**	38.2	41.1	(6.9)	254.2	297.9	407	413	Robert H. Cherins	(212) 350-1000
28	31	✓	**Telephone Marketing Programs**, New York	37.8	29.6	27.9	252.1	197.1	716	651	Andrew J. McKelvey, president	(212) 977-4200
29	30		**Levine, Huntley, Schmidt & Beaver**, New York	37.1	32.1	15.7	250.3	216.4	245	250	Robert H. Schmidt, president, ceo	(212) 545-3500
30	29	✓	**Ally & Gargano**, New York	37.0	34.4	7.6	316.0	295.2	230	220	William Luceno, ceo	(212) 688-5300
31	24		**Laurence, Charles, Free & Lawson**, New York	34.6	41.5	(16.5)	275.2	302.0	322	334	Charles Goldschmidt, chmn	(212) 213-4646
32	39		**Hal Riney & Partners**, San Francisco*	33.8	23.0	46.7	225.0	200.0	238	183	Hal Riney, chmn, ceo	(415) 981-0950
33	38		**TBWA Advertising**, New York	33.2	23.1	43.8	221.6	154.1	265	165	William Tragos, chmn, ceo	(212) 725-1150
34	33		**Nationwide Advertising Service**, Cleveland*	31.0	27.8	11.5	206.8	185.4	398	376	G. Gund III/G. Gund, co-chmn	(216) 579-0300
NR	NR	✓	**Bernard Hodes Group**, New York **(DDBN)**	30.5	30.7	(0.6)	203.1	204.4	393	419	Bernard Hodes, ceo, president	(212) 935-4000
35	32	✓	**HDM**, New York	30.3	28.6	6.1	247.3	228.9	373	277	Alain Godard, chmn	(212) 408-2100
NR	NR	✓	**Ammirati & Puris**, New York **(BBDO,DDBN)**	29.5	28.0	5.4	220.0	210.0	260	260	M. Puris/R. Ammirati, chmn	(212) 206-0500
36	35		**Tatham-Laird & Kudner**, Chicago	27.6	26.0	6.0	230.1	217.0	254	285	Charlotte Beers, chmn, ceo	(312) 337-4400
37	34		**Direct Marketing Group**, New York	25.7	26.1	(1.5)	149.6	152.9	625	637	John A. DePasquale, chmn	(212) 355-2530
38	37		**Warwick Baker & Fiore**, New York	25.5	24.0	6.3	170.0	160.0	NA	NA	John P. Warwick, chmn	(212) 941-4200
NR	NR	✓	**Sudler & Hennessey**, New York **(Y&R)**	24.6	20.6	19.6	164.0	137.2	215	193	William B. Gibson, chmn, president	(212) 265-8000
39	40	✓	**Evans Communications**, Salt Lake City	24.0	22.1	8.5	160.0	147.5	356	336	Jon L. Johnson, president, ceo	(801) 364-7000
NR	NR	✓	**Rapp Collins Marcoa**, Chicago **(BBDO,DDBN)**	23.8	23.7	0.3	226.0	236.3	340	328	David Hefter, chmn, ceo	(312) 454-0660
NR	NR	✓	**Fahlgren & Swink**, Parkersburg, W. Va. **(Lintas)**	23.6	18.9	24.8	157.5	126.2	340	284	H. Smoot Fahlgren, chmn, ceo	(304) 424-3591
40	43	✓	**Dailey & Associates**, Los Angeles	23.3	19.6	18.4	155.2	131.0	196	185	Phillip Joanou, chmn, ceo	(213) 386-7823
NR	NR	✓	**Cato Johnson Worldwide**, New York **(Y&R)**	22.6	19.0	18.7	150.5	126.8	308	230	William A. Power, ceo	(212) 941-3700
NR	NR	✓	**Thompson Recruitment**, Los Angeles **(JWT)**	21.6	16.7	29.5	144.0	111.0	360	260	Kim Macalister, president	(213) 655-4262
41	42		**Keller-Crescent Co.**, Evansville, Ind.	21.3	22.0	(3.4)	106.5	110.3	546	561	Thomas M. Smythe, president, ceo	(812) 464-2461
NR	NR	✓	**Kallir, Philips, Ross**, New York **(DDBN)**	21.2	17.7	20.1	168.0	163.2	206	215	John Kallir, chmn, ceo	(212) 856-8400
NR	NR		**Martin Agency**, Richmond, Va. **(SMS)***	21.1	16.9	24.4	140.5	113.0	225	195	Harry M. Jacobs, chmn	(804) 254-3400
NR	NR	✓	**Doremus & Co.**, New York **(BBDO)**	20.9	25.6	(18.5)	148.0	181.0	249	305	Curtis R. Troeger, chmn, ceo	(212) 964-0700
42	44		**Griffin Bacal**, New York	20.7	18.4	12.3	162.7	143.9	177	176	T.L. Griffin/J.M. Bacal, co-chmn	(212) 337-6400
43	49	✓	**Thomas G. Ferguson Associates**, Parsippany, N.J.	20.6	16.9	22.1	120.7	102.1	120	110	Thomas G. Ferguson, chmn, ceo	(201) 884-2200
44	55		**GSD&M**, Austin, Texas	20.2	15.3	32.1	150.8	124.1	234	171	Stephen Gurasich, chmn, ceo	(512) 327-8810
45	41	✓	**Bloom Cos.**, Dallas	20.0	22.1	(9.5)	168.2	182.6	255	263	Robert H. Bloom, chmn, ceo	(214) 443-9900
46	54		**Wyse Advertising**, Cleveland	19.9	15.7	26.5	140.4	105.8	275	231	Marc A. Wyse, chmn	(216) 696-2424
47	45		**Geer, DuBois**, New York	19.5	18.0	8.3	130.0	120.0	201	190	Peter Geer, president	(212) 741-1900
48	48	✓	**Rosenfeld, Sirowitz, Humphrey & Strauss**, New York	19.1	17.4	9.5	127.0	116.0	176	124	R. Rosenfeld/L. Sirowitz/H. Strauss	(212) 505-0200
NR	NR	✓	**Clarion Marketing**, Greenwich, Conn. **(DMB&B)**	18.8	16.4	14.5	125.2	109.6	133	126	Raymond S. Rizzo, president, ceo	(203) 531-3600
49	58		**Richards Group**, Dallas	18.7	15.1	24.3	125.1	101.4	194	166	six principals	(214) 891-5700
NR	NR		**Kobs & Draft Advertising**, Chicago **(BSBW)***	17.7	13.7	29.8	116.9	90.2	146	136	Howard Draft, chmn, ceo	(312) 944-3500
50	47	✓	**Rubin Postaer & Associates**, Los Angeles	17.4	17.5	(0.6)	143.1	128.7	157	148	Gerald R. Rubin, president	(213) 208-5000
51	51		**Ingalls, Quinn & Johnson**, Boston	16.9	16.2	4.5	137.1	133.4	202	219	Richard C. Garrison, chmn, ceo	(617) 954-1000
52	53	✓	**Davis, Ball & Colombatto Advertising**, Los Angeles	16.8	15.9	5.8	147.4	135.7	201	215	Robert M. Davis, chmn	(213) 688-7000
53	52	✓	**Eisaman, Johns & Laws**, Los Angeles	16.7	16.1	3.7	124.0	111.5	216	199	J.R. Eisaman, chmn	(213) 469-1234
54	57	✓	**Weightman Group**, Philadelphia	16.5	15.2	8.6	110.0	101.4	203	210	Charles Coffey, chmn	(215) 561-6100
NR	NR	✓	**Lavey/Wolff/Swift**, New York **(BBDO)**	16.1	12.7	27.3	107.7	84.5	159	135	John Swift, president, ceo	(212) 593-3630
NR	NR		**Fallon McElligott**, Minneapolis **(SMS)**	16.0	16.5	(2.9)	131.3	131.4	145	130	Pat Fallon, chmn	(612) 332-2445
55	63		**Bayer Bess Vanderwarker**, Chicago*	16.0	13.0	23.0	105.0	84.9	159	150	Gary Bayer, chmn, ceo	(312) 861-3800
NR	NR	✓	**Lewis, Gilman & Kynett**, Philadelphia **(FCB)**	15.9	17.3	(7.8)	106.0	115.0	210	218	Robert G. Wilder, chmn	(215) 790-4100
56	59	✓	**Cramer-Krasselt**, Milwaukee	15.8	14.0	13.4	108.6	96.5	188	181	Paul S. Counsell, chmn, ceo	(414) 227-3500
57	56		**William Douglas McAdams Inc.**, New York	15.6	15.2	2.5	107.0	107.0	163	159	Irwin C. Gerson, chmn	(212) 698-6400
58	61		**Avrett, Free & Ginsberg**, New York	15.5	13.3	16.7	128.8	112.0	102	75	Jack Avrett, chmn	(212) 832-3800
58	66		**Long, Haymes & Carr**, Winston-Salem, N.C.	15.5	12.0	29.4	103.5	83.6	205	181	Donald N. Adams, chmn, ceo	(919) 765-3630
NR	NR		**Klemtner Advertising**, New York **(S&SAW)**	15.5	12.0	29.2	121.1	90.2	135	125	Albert P. Molinaro Jr., chmn, ceo	(212) 463-3400
60	46	✓	**McKinney & Silver**, Raleigh, N.C.	15.4	17.9	(13.9)	102.9	119.5	107	122	Charles McKinney, chmn	(919) 828-0691
NR	NR	✓	**Medicus Intercon International**, New York **(DMB&B)**	14.8	12.6	17.6	133.5	113.5	160	158	Lawrence J. Lesser, chmn, ceo	(212) 468-3100
61	85		**Weiden & Kennedy**, Portland, Ore.*	14.7	9.3	58.1	98.0	62.0	98	65	Dan Weiden, president	(503) 228-4381
62	135		**Tarlow Advertising**, New York	14.6	6.1	139.9	109.2	39.9	74	27	Dick Tarlow, president	(212) 826-0399
63	62	✓	**Lois/GGK New York**, New York	14.4	13.3	7.9	99.7	99.4	95	95	George Lois, chmn, cd	(212) 757-6700
64	126		**Partners & Shevack**, New York	14.2	6.5	118.5	144.5	52.0	102	65	Brett Shevack, president, ceo	(212) 245-7300
65	50		**Tucker Wayne/Luckie & Co.**, Atlanta	14.1	16.7	(15.5)	104.5	119.7	172	187	Matthew Connor, chmn exec comm	(404) 521-7600
66	71	✓	**Asher/Gould Advertising**, Los Angeles	14.0	11.0	26.9	93.0	75.0	99	91	Harold Asher, chmn	(213) 931-4151
67	75		**Margeotes Fertitta & Weiss**, New York	13.7	10.6	29.1	88.8	68.7	95	75	George Fertitta, president	(212) 979-6600
NR	NR	✓	**Creswell, Munsell, Fultz & Zirbel**, Cedar Rapids, Iowa **(Y&R)**	13.6	11.9	14.3	90.5	79.0	196	190	F.C. Baker, president, ceo, chmn	(319) 395-6500
68	60	✓	**Cabot Communications**, Boston	13.1	13.7	(5.0)	91.2	95.5	125	161	William H. Monaghan, president, ceo	(617) 242-6200
NR	NR		**Rumrill-Hoyt**, Rochester, N.Y. **(S&SAW)**	13.0	11.3	14.6	86.6	75.6	168	166	Richard D. Thomson, chmn, ceo	(716) 272-6100
69	82	✓	**DCA Advertising**, New York	12.8	9.8	30.9	94.0	71.2	142	137	Toshio Naito, president	(212) 703-1400
NR	NR	✓	**M.E.D. Communications**, Woodbridge, N.J. **(DMB&B)**	12.7	14.2	(10.0)	83.6	93.0	100	120	Robert Portman, president	(201) 636-6600
70	64	✓	**Towne, Silverstein, Rotter**, New York	12.5	12.5	0.0	83.0	83.0	45	45	Leslie Towne, ceo	(212) 353-1700
71	76	✓	**QLM Associates**, Princeton, N.J.	12.4	10.5	18.0	82.3	69.7	96	87	Lawrence A. Quintman, president	(609) 683-1177
71	79	✓	**Barry Blau & Partners**, Fairfield, Conn.	12.4	10.3	20.3	101.2	85.3	128	118	Barry Blau, chmn	(203) 254-3700
73	78	✓	**Carmichael Lynch**, Minneapolis	12.1	10.5	15.7	87.9	76.2	190	160	Lee Lynch, chmn, ceo	(612) 334-6000
73	83		**Martin-Williams**, Minneapolis	12.1	9.8	23.5	100.0	83.0	133	115	David Floren, chmn, ceo	(612) 340-0800

Notes: Dollars are in millions. NR indicates agency not ranked. Initials in parentheses indicate the parent company in which the subsidiaries' figures are included. See Page S-20 for methodology. See Page S-58 for an alphabetical index. ✓ indicates that the agency received signature of an independent accountant verifying figures supplied to AA. * indicates that gross income and/or total volume figures are AA estimates.

AA chart: Kevin Brown

U.S.-based agencies by domestic gross income

Rank				U.S. gross income			U.S. billings		U.S. employees			
1989	**1988**		**Agency, headquarters**	**1989**	**1988**	**% chg**	**1989**	**1988**	**1989**	**1988**	**Top executive, title**	**Telephone**
75	67		**Al Paul Lefton Co.**, New York	11,900.0	11,700.0	1.7	70,000.0	68,000.0	153	149	Al Paul Lefton Jr., president, ceo	(212) 867-5100
76	69		**Henderson Advertising**, Greenville, S.C.	11,858.0	11,272.0	5.2	80,669.0	75,148.0	106	104	Ralph W. Callahan Jr., chmn	(803) 271-6000
77	68		**Cole & Weber**, Seattle	11,855.9	11,573.5	2.4	89,908.6	93,264.6	145	156	Mark McNeely, chmn	(206) 447-9595
78	81	✓	**Valentine Radford**, Kansas City, Mo.	11,798.1	10,195.9	15.7	79,381.1	70,286.5	153	147	Robert C. Lang, chmn	(816) 842-5021
79	70	✓	**Gross Townsend Frank Hoffman**, New York	11,755.6	11,267.4	4.3	78,374.9	75,153.3	120	109	Alan Gross, president	(212) 886-3000
80	NA	✓	**Lois/GGK Chicago**, Chicago	11,400.0	NA	NA	80,000.0	75,000.0	105	91	Edwin H. Holzer, chmn, ceo	(312) 527-5030
81	174		**Lord Einstein O'Neill & Partners**, New York	11,356.0	4,558.7	149.1	78,593.7	32,712.8	89	78	Richard J. Lord, chmn, ceo	(212) 768-5000
82	97	✓	**Deutsch Inc.**, New York	11,266.3	8,315.9	35.5	75,108.9	54,984.6	105	77	David Deutsch, chmn	(212) 995-7500
83	77		**Russ Reid Co.**, Pasadena, Calif.	11,100.0	10,500.0	5.7	74,000.0	70,000.0	155	155	Russ Reid, chmn	(818) 449-6100
84	65	✓	**Miller Advertising Agency**, New York	11,000.0	12,500.0	(12.0)	73,500.0	83,500.0	160	190	Robert Miller, president	(212) 929-2200
85	80		**Noble Communications**, Springfield, Mo	10,993.0	10,294.0	6.8	80,093.9	76,777.2	206	190	Robert B. Noble, chmn, ceo	(417) 882-5050
86	74	✓	**Liggett-Stashower**, Cleveland	10,950.0	10,609.0	3.2	72,400.0	70,300.0	140	135	David L. Stashower, chmn, ceo	(216) 348-8500
87	99		**Bentley, Barnes & Lynn**, Chicago	10,747.4	8,221.0	30.7	71,649.2	54,806.9	172	136	Paul Oleff, president	(312) 467-9350
88	101		**Slater Hanft Martin**, New York	10,593.0	8,099.0	30.8	69,935.0	53,274.0	68	56	Jerry Martin, chmn	(212) 674-3100
NR	NR		**Poppe Tyson**, New York **(Bozell)**	10,550.0	8,600.0	22.7	75,000.0	64,000.0	116	124	Fergus O'Daly, chmn, ceo	(212) 725-2900
89	91		**Mullen Advertising**, Wenham, Mass.	10,457.2	8,831.2	18.4	69,714.8	58,904.4	86	79	James X. Mullen, president	(508) 468-1155
90	86	✓	**Carrafiello-Diehl & Associates**, Irvington-on-Hudson, N.Y.	10,450.0	9,190.0	13.7	69,413.0	60,993.0	106	94	A. Louis Carrafiello, chmn, ceo	(914) 591-9191
91	73	✓	**William Cook Agency**, Jacksonville, Fla	10,300.4	10,697.0	(3.7)	72,065.3	76,462.7	132	147	Bernard C. Schramm Jr., chmn	(904) 353-3911
NR	NR		**Wahlstrom & Co.**, Stamford, Conn. **(FCB)***	10,142.1	8,708.7	16.5	67,614.0	58,058.0	142	128	Francis J. Barton, president, ceo	(203) 348-7347
92	219		**Kern/Mathai Direct Mail Advertising**, Santa Monica, Calif.	10,100.0	3,160.0	219.6	15,750.0	6,100.0	15	10	Russell M. Kern, president	(213) 452-0663
93	107		**DMCA Direct**, St. Louis*	10,035.0	7,758.7	29.3	61,345.0	47,085.0	420	390	Michael T. McSweeney, president	(314) 436-1122
NR	NR	✓	**Frank J. Corbett**, Chicago **(BBDO)**	9,860.3	9,786.0	0.8	65,768.0	65,272.6	80	78	Frank J. Corbett, chmn	(312) 664-5310
NR	NR	✓	**Brouillard Communications**, New York **(JWT)**	9,738.9	9,951.5	(2.1)	64,958.5	66,376.4	79	85	James H. Foster, president, ceo	(212) 867-8300
94	162		**Messner Vetere Berger Carey Schmetterer**, New York	9,733.2	4,933.8	97.3	72,098.0	49,338.0	52	28	Robert Schmetterer, president, ptnr	(212) 886-0200
95	127	✓	**Kresser, Craig/D.I.K.**, Los Angeles	9,621.6	6,471.2	48.7	67,721.6	44,620.6	78	55	C. Robert Kresser, chmn, ceo	(213) 553-8254
96	102	✓	**Devon Direct Marketing & Advertising**, Malvern, Pa.	9,600.0	8,000.0	20.0	82,000.0	66,200.0	76	46	Ronald D. Greene, mnging dir	(215) 644-0333
97	87		**Meldrum & Fewsmith**, Cleveland	9,500.0	9,031.0	5.2	62,000.0	60,200.0	111	108	Chris N. Perry, chmn, ceo	(216) 241-2141
98	93	✓	**Ackerman, Hood, & McQueen**, Oklahoma City	9,103.5	8,679.0	4.9	64,190.0	60,992.0	114	121	Angus McQueen, president, ceo	(405) 843-7777
99	103	✓	**Lawler Ballard**, Norfolk, Va.	9,094.0	7,886.0	15.3	60,656.0	52,598.0	159	151	B.R. Lawler, chmn	(804) 627-0261
100	88		**Burrell Communications Group**, Chicago	9,049.6	9,001.8	0.5	60,330.4	60,012.3	110	108	Thomas Burrell, chmn	(312) 443-8600
101	128	✓	**Hesselbart & Mitten Advertising**, Fairlawn, Ohio	9,003.6	6,462.7	39.3	60,251.9	43,127.8	107	88	Leo J. Lefort, chmn	(216) 666-3727
102	92	✓	**Miller Meester Advertising**, Minneapolis	9,000.0	8,790.0	2.4	60,030.0	58,629.3	110	99	Robert V. Miller, president, ceo	(612) 337-6600
103	72	✓	**Keye/Donna/Pearlstein**, Los Angeles	8,751.2	10,834.7	(19.2)	61,370.3	72,267.4	76	100	Leonard Pearlstein, president, ceo	(213) 477-0061
104	89	✓	**Keyes Martin & Co.**, Springfield, N.J.	8,750.0	9,000.0	(2.8)	58,000.0	58,000.0	90	100	Daniel M. Gaby, chmn, ceo	(201) 376-7300
105	84		**Dorritie & Lyons**, New York*	8,713.4	9,396.4	(7.3)	55,000.0	50,000.0	57	55	John F. Dorritie, president	(212) 687-9394
106	98	✓	**Elkman Advertising**, Bala Cynwyd, Pa.	8,671.0	8,300.0	4.5	57,820.0	55,328.0	110	110	Stanley Elkman, ceo	(215) 668-1100
107	95		**McAdams, Richman & Ong**, Bala Cynwyd, Pa	8,545.0	8,600.0	(0.6)	56,977.0	57,500.0	87	90	Brian McAdams, president, ceo	(215) 667-8900
NR	NR	✓	**Saatchi & Saatchi Direct**, Rochester, N.Y. **(S&SAW)**	8,538.0	8,857.0	(3.6)	54,911.0	59,148.0	115	120	Richard A. Peters, chmn, ceo	(716) 272-2500
108	96	✓	**Marketing Resources**, Overland Park, Kan.	8,517.9	8,337.2	2.2	56,900.0	55,700.0	160	178	Frank G. Weyforth Jr., president	(913) 648-8333
109	124		**Jack Levy & Associates**, Chicago	8,474.1	6,530.5	29.8	56,500.6	43,540.5	82	51	Jack Levy, president	(312) 332-7540
110	230	✓	**Gearon Hoffman Conlon & Nye**, Boston	8,310.0	3,027.4	174.5	40,678.0	20,040.8	34	33	Bob Conlon, chmn, cd	(212) 688-2400
111	122		**Berenter Greenhouse & Webster**, New York	8,301.0	6,600.0	25.8	60,076.0	48,022.0	52	48	William Berenter, chmn	(212) 995-9500
112	109		**Martin Marshall Jaccoma Mitchell**, New York	8,250.0	7,500.0	10.0	55,000.0	50,000.0	53	50	John Martin, president	(212) 683-0001
113	NR		**FKB direct**, Nashville*	8,208.8	NA	NA	54,504.0	NA	190	NA	Jim Edwards, chmn	(615) 366-1844
114	106	✓	**Colle & McVoy**, Minneapolis	8,191.3	7,795.2	5.1	58,382.5	57,712.8	118	141	Clarence M. Thompson, ceo, chmn	(612) 851-2500
115	94		**Richardson, Myers & Donofrio**, Baltimore	8,135.0	8,654.0	(6.0)	60,980.0	59,282.0	99	101	Hal Donofrio, president, ceo	(301) 576-9000
116	112	✓	**Bader Rutter & Associates**, Brookfield, Wis.	8,119.8	7,126.4	13.9	54,142.8	50,309.8	116	111	Ronald L. Bader, president	(414) 784-7200
117	108	✓	**Dugan/Farley Communications**, Upper Saddle River, N.J.	8,046.4	7,653.3	5.1	52,576.9	50,026.2	164	147	E. John Farley, president, ceo	(201) 934-0720
118	120		**Goodwin Dannenbaum Littman & Wingfield**, Houston	7,982.4	6,606.6	20.8	56,550.0	49,400.0	96	72	Earl Littman, chmn	(713) 622-7676
119	113		**Goodby, Berlin & Silverstein**, San Francisco*	7,920.0	7,050.0	12.3	52,800.0	47,000.0	55	55	J. Goodby/A. Berlin/R. Silverstein	(415) 392-0669
120	150		**Fogarty & Klein**, Houston	7,913.9	5,540.1	42.8	51,812.0	36,936.2	68	48	William H. Fogarty, principal	(713) 528-3354
121	36	✓	**LGFE Inc.**, New York	7,722.0	24,590.0	(68.6)	59,290.0	NA	92	129	Tim Elliott, ceo	(212) 421-6050
122	145	✓	**Grace & Rothschild**, New York	7,717.0	5,754.0	34.1	51,450.0	38,360.0	43	34	Roy Grace, chmn	(212) 319-1616
123	105		**William R. Biggs/Gilmore Associates**, Kalamazoo, Mich.	7,705.0	7,820.0	(1.5)	51,162.0	52,300.0	100	110	Ron Davis, president	(616) 349-7711
124	131	✓	**North Castle Partners**, Stamford, Conn	7,690.0	6,310.0	21.9	62,110.0	50,404.0	78	65	Lynn Andrew Rotando, president	(203) 358-2100
125	146		**Mendoza, Dillon & Asociados**, Newport Beach, Calif.	7,667.7	5,749.0	33.4	63,389.9	48,593.0	56	42	Richard E. Dillon, president	(714) 851-1811
126	137		**Berline Group**, Birmingham, Mich.*	7,632.5	6,006.0	27.1	50,010.0	39,340.0	46	52	Jim Berline, president	(313) 540-7557
127	140		**Babbit & Reiman Advertising**, Atlanta	7,600.0	5,900.0	28.8	53,901.0	41,850.0	62	41	Joey Reiman, chmn, ceo	(404) 365-0550
128	100	✓	**MARC Advertising**, Pittsburgh	7,542.1	8,220.0	(8.2)	50,306.0	54,811.0	95	105	Louis J. Cardamone, chmn, ceo	(412) 562-2000
129	90	✓	**Christopher Thomas/Muller Jordan Weiss**, New York	7,540.0	8,990.0	(16.1)	50,444.5	71,150.0	104	110	Christopher B. Santry, chmn, ceo	(212) 924-7600
130	110	✓	**Eric Mower & Assoc.**, Syracuse, N.Y.	7,476.3	7,429.2	0.6	49,866.8	50,451.4	103	117	Eric Mower, president, ceo	(315) 466-1000
131	123	✓	**Yellow Pages Marketing Services**, Mequon, Wis.	7,472.0	6,566.0	13.8	49,824.0	43,775.0	140	140	Richard C. Miller, president, ceo	(414) 241-8600
132	116		**Ruhr/Paragon**, Minneapolis	7,435.8	6,847.0	8.6	55,500.0	51,100.0	80	86	Charles F. Ruhr, chmn	(612) 332-4565
133	130		**Robert A. Becker EWDB**, New York	7,400.0	6,363.0	16.3	50,000.0	42,422.0	62	65	Robert A. Becker, chmn	(212) 727-7000
134	111		**Levy, King & White**, Buffalo	7,383.0	7,275.0	1.5	47,260.0	48,500.0	124	127	P. King, chmn, ceo	(716) 853-6755
135	149		**Saugatuck/FKB**, Westport, Conn.*	7,353.6	5,585.8	31.6	47,676.0	40,352.7	41	34	Gary W. Oakley, ceo, chmn	(203) 226-8166
136	178	✓	**Sutton Healthcare Group**, New York	7,300.0	4,300.0	69.8	52,300.0	28,800.0	96	64	Glenn DeSimone, president	(212) 779-1818
137	125		**Borders, Perrin & Norrander**, Portland, Ore.	7,261.0	6,518.0	11.4	48,434.0	41,674.0	91	90	Peter M. Hatt, ceo, chmn	(503) 227-2506
NR	NR	✓	**Chapman Direct Advertising**, New York **(Y&R)**	7,226.0	7,745.0	(6.7)	48,198.0	51,650.0	62	70	William P. Sutherland, president	(212) 614-3880
138	114	✓	**Mintz & Hoke**, Avon, Conn.	7,162.0	7,040.0	1.7	47,750.0	46,933.0	88	98	Joseph Hoke, ceo	(203) 678-0473
139	133	✓	**Lally, McFarland & Pantello**, New York	7,000.0	6,250.0	12.0	54,400.0	50,400.0	80	91	Ron Pantello, president	(212) 532-1000
139	132	✓	**Malone Advertising**, Akron, Ohio	7,000.0	6,300.0	11.1	76,355.5	70,021.0	133	110	Bain L. Malone, president, ceo	(216) 376-6148
NR	NR		**Hoffman York & Compton**, Milwaukee **(S&SAW)**	6,838.1	5,948.9	14.9	40,227.1	33,383.6	110	101	Eugene Gilmartin, president	(414) 289-9700
141	119		**Smith/Greenland**, New York	6,800.0	6,712.0	1.3	4[illegible],086.8	44,040.0	68	71	Leo Greenland, chmn, ceo	(212) 757-3200
142	144		**Frankenberry, Laughlin & Constable**, Milwaukee	6,780.0	5,775.0	17.4	45,200.0	38,500.0	74	67	Dennis Frankenberry, partner	(414) 272-2400
143	134	✓	**Eisner & Associates**, Baltimore	6,760.0	6,113.0	10.6	52,196.7	46,005.0	70	70	Steven C. Eisner, president, ceo	(301) 685-3390
144	115		**Henry J. Kaufman & Associates**, Washington*	6,750.0	6,975.0	(3.2)	45,000.0	46,500.0	70	65	Michael Carberry, president, ceo	(202) 333-0700
145	121	✓	**Grant/Jacoby**, Chicago	6,700.0	6,600.0	1.5	66,022.0	65,680.0	95	95	Bruce I. Carlson, chmn	(312) 664-2055
146	164	✓	**HutchesonShutze**, Atlanta	6,684.4	4,850.0	37.8	44,717.0	33,274.1	72	68	Don Hutcheson, chmn, ceo	(404) 523-2000
147	117		**Waring & LaRosa**, New York	6,640.0	6,800.0	(2.4)	53,600.0	50,200.0	60	60	Joseph A. LaRosa, chmn	(212) 755-0700
148	138		**McFarland & Drier**, Miami	6,500.0	6,000.0	8.3	43,000.0	40,000.0	65	62	William C. McFarland, principal	(305) 358-0108
149	136	✓	**Edwin Bird Wilson**, New York	6,439.9	6,076.6	6.0	49,326.9	44,876.6	66	82	Delano W. Ladd Jr., chmn	(212) 684-5220
NR	NR		**Anderson & Lembke**, Stamford, Conn. **(C/D/M)**	6,400.0	6,000.0	6.7	45,000.0	40,000.0	50	35	Hans Ullmark, president	(203) 326-7500
150	143		**VanSant, Dugdale & Co.**, Baltimore	6,390.0	5,810.9	10.0	42,600.0	38,739.3	75	63	Kenneth E. Mayhorne, chmn	(301) 539-5400
151	148		**Eric Ericson & Associates**, Nashville	6,326.8	5,598.3	13.0	42,199.9	37,340.3	94	86	Janice W. Wendell, chmn, ceo	(615) 242-1050
152	104	✓	**J. Richard Smith Ltd.**, Old Bethpage, N.Y.	6,319.0	7,840.0	(19.4)	41,257.1	40,150.0	36	36	Gerald Smith, chmn	(516) 293-8700
NR	NR		**Albert Frank-Guenther Law**, New York **(FCB)**	6,255.0	8,284.0	(24.5)	41,718.0	55,258.0	57	72	Stephen J. Witt, chmn, ceo	(212) 248-5200
153	129	✓	**Arnold Advertising**, Boston	6,175.5	6,402.1	(3.5)	41,497.0	42,447.4	110	112	Ed Eskandarian, chmn, ceo	(617) 357-1900
154	160	✓	**Paolin & Sweeney Advertising**, Cherry Hill, N.J.	6,100.0	5,000.0	22.0	33,700.0	24,200.0	58	49	John R. Paolin, president	(609) 667-7700
155	118	✓	**Campbell & Wagman**, Los Angeles	6,053.0	6,774.0	(10.6)	45,730.0	58,494.0	51	53	Craig B. Campbell, president	(213) 444-3200
156	172	✓	**Northlich Stolley LaWarre**, Cincinnati	5,924.0	4,642.0	27.6	39,514.0	30,935.0	75	69	William LaWarre, president	(513) 421-8840
157	154	✓	**Lord, Sullivan & Yoder**, Columbus, Ohio	5,893.5	5,341.0	10.3	45,349.4	43,842.9	83	90	Robert E. Sullivan, chmn	(614) 846-8500
158	142	✓	**Abelson-Taylor**, Chicago	5,852.3	5,838.4	0.2	44,669.0	43,954.0	75	75	Marv Abelson, ceo	(312) 781-1700
159	139		**Buntin Advertising**, Nashville	5,834.4	5,989.0	(2.6)	38,896.1	39,926.9	103	100	Jeffrey Buntin	(615) 244-5720
160	170	✓	**Greenstone Rabasca Roberts**, Melville, N.Y.	5,827.8	4,676.8	24.6	39,531.8	31,194.0	93	53	Ronald M. Greenstone, chmn, ceo	(516) 249-2121
161	156	✓	**Price McNabb Advertising**, Asheville, N.C.	5,739.1	5,269.9	8.9	42,115.6	41,590.6	88	88	Charles R. Price, chmn, ceo	(704) 255-2600
162	141	✓	**Jayme Organization**, Cleveland	5,734.1	5,856.2	(2.1)	45,428.8	46,658.2	91	105	George N. Havens, chmn, ceo	(216) 831-0110
163	147		**Ad Team**, North Miami Beach, Fla.	5,660.0	5,660.0	0.0	0.0	NA	49	46	Russ Oasis, president	(305) 949-8326
164	171	✓	**Great Scott Advertising**, New York	5,646.8	4,659.1	21.2	35,449.0	29,251.9	49	52	Lorraine Borden, ceo, president	(212) 826-2050
165	155		**Jordan Tamraz Caruso Advertising**, Chicago	5,604.0	5,338.5	5.0	37,360.0	35,589.8	80	75	Joseph Caruso, president	(312) 951-2000

Notes: Dollars are in thousands. NR indicates agency not ranked. Initials in parentheses indicate the parent company in which the subsidiaries' figures are included. See Page S-20 for methodology. See Page S-58 for an alphabetical index. ✓ indicates that the agency received signature of an independent accountant verifying figures supplied to AA. * indicates that gross income and/or total volume figures are AA estimates.

U.S.-based agencies by domestic gross income

Rank				U.S. gross income			U.S. billings		U.S. employees			
1989	1988		Agency, headquarters	1989	1988	% chg	1989	1988	1989	1988	Top executive, title	Telephone
166	152		**Kolon, Bittker & Desmond**, Troy, Mich.	5,500.0	5,400.0	1.9	31,941.0	30,000.0	94	101	John S. Kolon, president, coo	(313) 524-2500
NR	NR		**Conill Advertising**, New York **(S&SAW)**	5,470.0	5,550.0	(1.4)	36,450.0	37,000.0	57	73	Carlos R. Rossi, chmn, ceo	(212) 481-3131
167	163		**Hameroff/Milenthal/Spence**, Columbus, Ohio	5,373.0	4,900.0	9.7	41,974.3	38,372.0	115	121	D.L. Milenthal, chmn	(614) 221-7667
168	151		**Lauer Markin Gibbs**, Maumee, Ohio	5,262.6	5,475.1	(3.9)	34,404.4	35,866.3	97	93	three sr ptnrs	(419) 893-2500
169	157		**Cox Landey & Partners**, New York	5,250.0	5,250.0	0.0	35,000.0	35,000.0	30	30	Martin H. Landey, chmn, ceo	(212) 838-5900
170	176	✓	**Trahan, Burden & Charles**, Baltimore	5,200.0	4,500.0	15.6	47,400.0	40,800.0	65	62	Robert Matz, president	(301) 347-7500
171	153		**Newmark Posner & Mitchell**, New York	5,111.0	5,369.0	(4.8)	30,093.4	30,873.0	NA	NA	Sidney Posner, president	(212) 867-3900
172	159	✓	**Winius-Brandon Advertising**, Bellaire, Texas	5,092.0	5,019.7	1.4	39,351.2	39,525.1	43	43	Arthur Casper, president	(713) 666-1765
173	167		**Stone & Simons Advertising**, Southfield, Mich.	5,091.9	4,743.2	7.3	32,048.3	31,560.5	48	48	Charles G. Stone, president	(313) 358-4800
174	NR		**Donahoe & Purdhit**, Rosemont, Ill.	5,000.0	NA	NA	5,800.8	NA	11	NA	Edward J. Donahoe, president	(708) 825-8010
175	181	✓	**Doe-Anderson Advertising Agency**, Louisville	4,991.7	4,213.3	18.5	37,220.3	31,106.4	77	59	Robert S. Allison, president, ceo	(502) 589-1700
176	165		**Leonard Monahan Lubars & Partners**, Providence, R.I.	4,849.9	4,820.5	0.6	32,348.8	32,152.6	55	70	Bruce N. Leonard, chmn, ceo	(401) 277-9020
177	240		**Puskar Gibbon Chapin**, Dallas*	4,812.5	2,812.5	71.1	38,500.0	22,500.0	35	30	Jim Gibbon, president	(214) 528-5400
178	168	✓	**Haddon Advertising**, Chicago	4,800.0	4,725.0	1.6	43,347.5	43,011.8	47	50	Harvey L. Haddon, president	(312) 943-6266
179	192	✓	**Gilbert, Whitney & Johns**, Whippany, N.J.	4,745.0	3,875.0	22.5	32,600.0	26,000.0	71	56	John Daltner, president	(201) 386-1776
180	179	✓	**Simons Michelson Zieve**, Troy, Mich.	4,680.6	4,275.0	9.5	32,800.0	29,000.0	67	74	Morton Zieve, chmn	(313) 362-4242
181	189	✓	**Pedone & Partners**, New York	4,553.8	3,961.9	14.9	30,361.2	26,412.5	29	25	Michael F. Pedone, president, ceo	(212) 319-2000
182	218	✓	**Dorland Sweeney Jones**, Philadelphia	4,550.2	3,166.9	43.7	31,944.5	22,967.6	57	51	Harry A. Sweeney Jr., president	(215) 625-0111
183	161		**Taylor Brown Smith & Perrault**, Houston	4,528.9	4,952.5	(8.6)	30,203.0	33,028.2	53	55	Larry Taylor, chmn, ceo	(713) 877-1220
184	237	✓	**Girgenti, Hughes, Butler & McDowell**, New York	4,520.0	2,850.0	58.6	30,100.0	19,000.0	42	26	Steven Girgenti, president	(212) 481-7080
185	276		**CHC Advertising**, Woodridge, N.J.	4,500.0	2,250.0	100.0	30,000.0	15,000.0	25	14	William W. Bishop, chmn	(201) 636-7080
186	175		**Kenneth C. Smith Advertising**, La Jolla, Calif.*	4,500.0	4,500.0	0.0	30,000.0	30,000.0	32	32	Kenneth C. Smith, president, ceo	(619) 459-4155
187	169	✓	**Gray Kirk & Evans**, Baltimore	4,483.9	4,700.0	(4.6)	40,300.0	39,165.0	70	69	William G. Evans, chmn	(301) 727-4306
188	182		**Stone, August, Baker Communications Cos.**, Troy, Mich.	4,361.2	4,183.5	4.2	30,878.1	30,373.0	52	55	Ronald Stone, chmn	(313) 641-0400
189	205	✓	**Aydlotte & Cartwright**, Atlanta	4,356.0	3,485.0	25.0	22,000.0	17,000.0	52	40	William Y. Aydlotte, president	(404) 438-7312
190	252		**Publicis Inc.**, New York	4,291.0	2,666.0	61.0	31,683.0	19,040.0	NA	NA	NA	NA
191	264		**Bonneville Media Communications**, Salt Lake City	4,254.1	2,448.9	73.7	25,327.3	14,355.4	130	120	Richard D. Alsop, president	(801) 237-2600
192	186	✓	**Marketing Support**, Chicago	4,251.4	4,020.0	5.8	37,348.0	36,891.4	65	62	David L. Weiner, president	(312) 565-0044
193	250	✓	**Keroff & Rosenberg Advertising**, Chicago	4,244.6	2,698.8	57.3	35,133.4	29,863.4	65	57	C. Rosenberg/W. Keroff, ptnrs	(312) 321-9000
194	191		**Wolf Blumberg Krody**, Cincinnati	4,227.0	3,902.0	8.3	28,180.0	26,013.3	55	51	Dale Wolf, president	(513) 751-0258
195	216	✓	**Larkin, Meeder & Schweidel**, Dallas	4,206.4	3,230.4	30.2	28,040.4	21,253.6	45	40	Carl Larkin, chmn, president	(214) 688-7070
196	195		**Harris & Drury Advertising**, Ft. Lauderdale	4,202.4	3,750.8	12.0	28,021.0	25,010.0	58	50	John Drury, president	(305) 771-1800
197	184	✓	**Lohmeyer Simpson Communications**, Morristown, N.J.	4,200.0	4,050.0	3.7	28,000.0	27,000.0	37	38	Richard J. Lohmeyer, president	(201) 267-0400
198	241	✓	**Zwiren Collins Karo Trusk & Ayer**, Chicago	4,200.0	2,800.0	50.0	30,000.0	24,000.0	30	22	Jan Zwiren, president	(312) 280-0830
199	194		**Sawyer Riley Compton**, Atlanta	4,176.6	3,761.7	11.0	27,044.0	24,497.8	46	41	L. Gordon Sawyer, chmn	(404) 393-9849
200	203	✓	**Karsh & Hagan**, Englewood, Colo.	4,160.1	3,493.9	19.1	26,845.7	22,592.4	53	55	P.H. Karsh/T.P. Hagan, co-chmn	(303) 770-8088
201	180	✓	**Leslie Advertising Agency**, Greenville, S.C.	4,123.8	4,267.9	(3.4)	27,944.1	30,110.5	70	61	E. Dean Anderson, chmn, ceo	(803) 271-8340
202	256		**Floathe & Associates**, Bellevue, Wash.	4,081.5	2,599.4	57.0	28,332.3	18,579.3	64	44	Maury Floathe, president	(206) 462-8400
203	196		**Stern Advertising**, Pepper Pike, Ohio	4,050.0	3,750.0	8.0	27,000.0	25,000.0	50	45	William J. Stern, president	(216) 464-4850
204	197	✓	**Reimel Carter Advertising**, Philadelphia	4,048.0	3,741.0	8.2	26,181.0	24,212.0	40	38	T.L. Reimel, president, ceo	(215) 735-3200
NR	NR		**Baxter, Gurian & Mazzei**, Beverly Hills, Calif. **(BBDO)**	4,000.0	2,650.0	50.9	26,000.0	17,675.5	45	30	Donald J. Baxter, chmn	(213) 657-5050
205	210	✓	**Lowe Tucker Metcalf**, New York*	4,000.0	3,400.0	17.6	27,000.0	23,000.0	58	56	Bill Tucker, ceo	(212) 752-7600
206	177		**McKinney Inc.**, Philadelphia	3,960.0	4,328.0	(8.5)	30,616.0	31,216.0	69	80	Frank W. Callahan, president	(215) 922-2635
207	173	✓	**Shelly Berman Communicators**, Westerville, Ohio	3,956.9	4,569.4	(13.4)	26,356.6	30,476.9	69	87	Sheldon M. Berman, chmn	(614) 891-7070
208	198		**Marquardt & Roche**, Stamford, Conn.	3,943.3	3,738.0	5.5	25,996.0	24,656.3	40	45	James Marquardt, president	(203) 327-0890
209	188		**Cranford Johnson Robinson Woods**, Little Rock, Ark.	3,927.7	3,969.0	(1.0)	26,197.4	26,473.4	72	68	Wayne Cranford, chmn, ceo	(501) 376-6251
210	190	✓	**Juhl Agency**, Mishawaka, Ind.	3,908.6	3,905.0	0.1	30,026.5	29,163.0	67	69	Howard J. Blackwood, president	(219) 271-5621
NR	NR	✓	**Botto, Roessner, Horne & Messinger**, New York **(Ketchum)***	3,897.9	1,191.6	227.1	25,986.0	7,944.0	38	38	Robert J. Botto, president	(212) 564-5244
211	204		**Sullivan Higdon & Sink**, Wichita, Kan.	3,883.6	3,490.1	11.3	33,715.0	27,654.3	55	53	B. Vaughn Sink, president	(316) 263-0124
212	193	✓	**Tromson Monroe Advertising**, New York	3,830.0	3,765.0	1.7	30,200.0	29,500.0	40	40	Mario Trombone, chmn, ceo	(212) 752-8660
213	202		**Lawrence Butner Advertising**, New York	3,816.2	3,649.0	4.6	25,239.6	24,337.8	44	35	Lawrence Butner, president, ceo	(212) 682-3200
214	222	✓	**Davidoff White Good**, Westport, Conn.	3,800.5	3,070.8	23.8	25,337.0	20,473.0	52	52	Denise T. Davidoff, chmn	(203) 454-3425
215	199		**Stan Merritt Inc./Advertising**, New York	3,797.5	3,717.0	2.2	28,500.0	28,000.0	20	18	Stanley S. Merritt, president, ceo	(212) 867-4650
216	166	✓	**Lyons Inc.**, Wilmington, Del.	3,750.7	4,751.8	(21.1)	25,108.3	30,573.9	67	77	William N. Spiker, chmn, ceo	(302) 654-6146
217	225		**Houston Advertising**, Boston	3,742.0	3,057.0	22.4	24,958.0	20,382.0	43	43	Douglas Houston, chmn	(617) 267-5050
218	221	✓	**Goldfarb Hoff & Co.**, Southfield, Mich.	3,713.2	3,108.5	19.5	24,255.8	20,350.0	44	41	Robert Goldfarb, chmn	(313) 350-8200
219	214	✓	**McDougall Associates**, Peabody, Mass.	3,705.0	3,255.0	13.8	24,700.0	21,700.0	33	31	Michael J. McDougall, chmn	(508) 532-6500
220	226	✓	**Marcus Advertising**, Cleveland	3,704.9	3,055.5	21.3	24,869.1	22,373.4	53	48	Harvey Scholnick, president	(216) 292-4700
221	187		**Franklin Spier Inc.**, New York	3,699.8	3,988.1	(7.2)	24,677.5	26,600.6	43	43	Alix Nelson, chmn, ceo	(212) 679-4441
222	255		**Food Group**, New York	3,611.5	2,616.8	38.0	23,498.0	17,075.8	22	23	Donald Axelroad, president	(212) 725-5766
223	302	✓	**Fessel, Siegfriedt & Moeller Advertising**, Louisville	3,602.8	1,908.3	88.8	13,272.2	9,758.8	36	30	Rudy F. Moeller Sr., president	(502) 585-5154
224	185	✓	**Decker Rickard**, Glastonbury, Conn.	3,600.0	4,048.0	(11.1)	24,000.0	27,000.0	47	47	Albert D. Mason, ceo	(203) 659-1311
224	279	✓	**McConnaughy Barocci Brown**, Chicago	3,600.0	2,200.0	63.6	33,000.0	20,250.0	35	23	Tom McConnaughy, president	(312) 321-8000
224	NR		**Ted Thomas Associates**, Philadelphia*	3,600.0	NA	NA	24,000.0	NA	50	45	Robert D. Ritchie, president	(215) 592-7500
227	234	✓	**Brady Co.**, Menomonee Falls, Wis.	3,590.0	2,942.3	22.0	23,945.3	20,575.8	63	61	John B. Liebenstein, president, ceo	(414) 255-0100
228	227	✓	**Gardner Communications**, San Francisco	3,555.0	3,045.0	16.7	23,700.0	20,300.0	32	30	Robert K. Gardner, president	(415) 434-2191
229	206		**Dudnyk Co.**, Horsham, Pa.	3,550.0	3,480.0	2.0	23,700.0	23,200.0	44	45	Edward Dudnyk, president	(215) 443-9406
230	207		**Warren/Kremer Advertising**, New York	3,550.0	3,475.0	2.2	19,600.0	19,465.0	39	39	Peter Warren, president	(212) 686-2914
231	208	✓	**Frank C. Nahser Inc.**, Chicago	3,539.3	3,446.4	2.7	24,949.5	25,234.7	47	47	F. Byron Nahser, president, ceo	(312) 845-5000
232	260		**Forsythe Marcelli Johnson Advertising**, Newport Beach, Calif.	3,530.4	2,530.8	39.5	23,088.1	16,553.6	40	33	James H. Forsythe, president	(714) 759-9500
233	215	✓	**Rubin Reid Noto & Ehrenthal**, New York	3,490.0	3,251.0	7.4	33,470.0	31,867.5	36	34	Mel Rubin, president	(212) 889-1010
234	158	✓	**Vickers & Benson/FKQ**, Buffalo	3,479.9	5,033.3	(30.9)	23,203.6	33,563.3	42	87	Jim Titus, president	(716) 688-1177
235	239	✓	**Harris, Baio & McCullough**, Philadelphia	3,477.1	2,818.3	23.4	23,181.3	18,795.8	23	21	George J. Harris, president	(215) 440-9800
236	258	✓	**Kaufman & Maraffi Advertising**, New York	3,461.5	2,544.0	36.1	22,547.4	16,700.0	24	18	John Maraffi, president	(212) 867-0670
237	211	✓	**Kolesar & Hartwell**, Minneapolis	3,453.4	3,373.4	2.4	23,022.5	22,500.5	45	44	David Kolesar, president	(612) 343-0418
238	213	✓	**Salvati Montgomery Sakoda**, Costa Mesa, Calif.	3,405.9	3,298.7	3.2	22,717.1	22,002.7	41	37	Philip J. Salvati, president	(714) 966-0200
239	229	✓	**Siddall, Matus & Coughter**, Richmond, Va.	3,341.0	3,042.2	9.8	33,735.4	30,181.3	39	39	John N. Siddall, chmn, ceo	(804) 788-8011
240	232		**Hughes Advertising**, St. Louis	3,314.0	3,010.2	10.1	21,678.1	19,729.3	43	39	Jack A. Hughes, president	(314) 721-3400
241	267		**Advertising Communications**, Davenport, Iowa	3,300.0	2,400.0	37.5	22,770.0	16,970.0	63	55	Tim Bawden, president	(319) 326-1224
242	261		**Berenson, Isham & Partners**, Boston	3,279.2	2,504.5	30.9	18,691.5	17,557.6	19	18	Paul Berenson, president	(617) 423-1120
243	238		**Gerber Advertising Agency**, Portland, Ore.*	3,263.3	2,836.2	15.1	19,868.0	18,005.0	51	39	Phil Stevens, president, ceo	(503) 221-0100
244	224		**Potter Hazlehurst**, East Greenwich, Conn.*	3,262.5	3,057.0	6.7	21,750.0	20,381.0	46	53	Thomas E. Hazlehurst, chmn	(401) 885-4300
245	257	✓	**Hallmark Advertising**, Pittsburgh	3,259.0	2,571.0	26.8	17,880.0	17,137.0	49	48	Marvin S. Jacobson, president	(412) 687-0400
246	242		**Gumpertz/Bentley/Fried**, Los Angeles	3,258.4	2,780.8	17.2	23,117.3	22,500.0	34	34	Richard Fried, president	(213) 931-6301
247	201		**John Malmo Advertising**, Memphis*	3,204.7	3,692.9	(13.2)	21,139.0	23,959.0	46	58	John Malmo, president, ceo	(901) 523-2000
248	200		**Kerker & Associates**, Minneapolis	3,202.3	3,701.2	(13.5)	23,592.1	26,835.0	NA	46	Charles C. Wanous, president	(612) 835-7922
249	235	✓	**Clarity Coverdale Rueff Advertising**, Minneapolis	3,200.0	2,900.0	10.3	20,845.0	19,700.0	29	23	Robert Rueff, ceo	(612) 339-3902
250	220		**Pihas, Schmidt, Westerdahl Co.**, Portland, Ore.	3,167.7	3,149.0	0.6	22,789.8	23,003.4	56	51	John Pihas, president	(503) 279-4000
251	245		**Stephan & Brady**, Madison, Wis.	3,156.9	2,750.0	14.8	23,398.3	21,185.6	48	44	Jack Ragel, chmn, president, ceo	(608) 241-4141
252	233		**Advertising Works**, Honolulu*	3,150.0	3,000.0	5.0	21,000.0	20,000.0	46	42	Darrel Kloninger, president	(808) 955-4416
252	311	✓	**Nash Direct**, New York	3,150.0	1,806.0	74.4	21,003.2	12,042.4	35	14	Edward Nash, president	(212) 758-0120
254	271		**Finnegan & Agee**, Richmond, Va.	3,136.6	2,320.5	35.2	20,911.4	18,005.1	53	55	Tim Finnegan, chmn	(804) 643-4100
255	223		**Healy-Schutte & Co.**, Buffalo	3,108.4	3,063.6	1.5	23,995.9	23,346.8	58	56	Alden F. Schutte, president, ceo	(716) 884-2120
256	319		**Lewis, Browand & Associates**, Oakland, Calif.*	3,098.0	1,713.0	80.9	20,653.0	11,418.0	40	25	Roger Lewis, president	(415) 536-0500
257	236	✓	**Sefton Associates**, Grand Rapids, Mich.	3,081.5	2,857.0	7.9	20,441.0	19,060.0	49	47	David D. Teater, chmn, ceo	(616) 957-0600
258	246		**Silverstone, Adkins & Breit**, Stratford, Conn.*	3,072.1	2,746.8	11.8	20,242.8	18,108.5	17	17	Bruce T. Silverstone, president	(203) 375-2887
259	183		**Barnum & Souza**, New York	3,070.6	4,115.1	(25.4)	27,370.5	36,493.9	35	38	Barbara J. Barnum, chmn	(212) 995-2990
260	272	✓	**Fox MMJM Direct**, New York	3,063.0	2,277.0	34.5	20,071.5	15,006.6	30	25	Neil S. Fox, president, ceo	(212) 683-0002
261	274	✓	**Lockhart & Pettus**, New York	3,057.0	2,261.0	35.2	20,380.0	15,073.0	32	33	Keith E. Lockhart, president	(212) 725-2828
NR	NR	✓	**Blair Advertising**, Rochester, N.Y. **(BBDO)**	3,025.9	3,756.4	(19.4)	20,173.0	25,042.5	44	52	John F. Kraushaar, chmn	(716) 473-0440

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U.S.-based agencies by domestic gross income

Rank				U.S. gross income			U.S. billings		U.S. employees			
1989	**1988**		**Agency, headquarters**	**1989**	**1988**	**% chg**	**1989**	**1988**	**1989**	**1988**	**Top executive, title**	**Telephone**
262	263	✓	**Fitzgerald & Co.**, Atlanta	3,006.7	2,490.7	20.7	21,615.5	16,710.5	29	21	David P. Fitzgerald, president	(404) 239-0468
263	278	✓	**S.J. Weinstein Associates**, New York	3,000.0	2,200.0	36.4	20,000.0	14,667.0	32	24	Stephen J. Weinstein, ceo	(212) 206-0222
264	275		**Arian, Lowe & Travis Advertising**, Chicago	2,924.8	2,260.4	29.4	20,072.7	15,742.2	44	34	David Lowe, chmn	(312) 243-3500
265	285	✓	**Wilson Sculley Associates**, St. Louis	2,890.0	2,150.0	34.4	19,276.3	14,340.5	29	24	Valarie M. Wilson, chmn, ceo	(314) 434-1870
266	244		**Harris West Blaisdell Advertising**, Minneapolis	2,836.3	2,750.0	3.1	17,856.0	20,260.0	28	36	Rob West, president, ceo	(612) 941-9500
267	251	✓	**Hitchcock Fleming & Associates**, Akron, Ohio	2,830.3	2,684.5	5.4	18,567.6	17,654.5	49	50	R. Cyrus Hitchcock, president	(216) 376-2111
268	421		**Creative Alliance**, Louisville	2,825.0	750.7	276.3	17,584.8	4,700.9	32	16	Debbie Scoppechio, president	(502) 584-8787
269	284	✓	**Quest Business Agency**, Houston	2,777.5	2,152.1	29.1	18,354.1	14,221.3	45	38	Alan D. Vera, president, ceo	(713) 956-6569
270	294	✓	**McFrank & Williams Advertising**, New York	2,750.0	2,000.0	37.5	15,750.0	12,000.0	50	45	Michael Bruce, president	(212) 944-1300
271	253		**Baron & Zaretsky Advertising**, New York	2,723.1	2,640.0	3.1	17,500.0	17,050.0	25	25	Kenneth Baron, president	(212) 677-1747
272	247	✓	**Duffy & Shanley**, Providence, R.I.	2,704.0	2,702.2	0.1	18,035.5	18,023.9	40	40	David A. Duffy, president	(401) 274-0001
273	248		**KK&M Advertising**, Boston	2,700.0	2,700.0	0.0	26,500.0	28,700.0	35	45	Dennis Kunian, chmn	(617) 787-0330
274	243		**McKone & Co.**, Irving, Texas	2,699.4	2,766.9	(2.4)	18,005.3	18,455.5	35	33	Peter J. McKone, president	(214) 550-7433
275	231		**Waldbillig & Besteman**, Madison, Wis.	2,687.5	3,014.6	(10.9)	18,075.2	21,409.1	29	34	William J. Waldbillig, president	(608) 238-4767
276	249		**John Emmerling Inc.**, New York	2,654.5	2,699.7	(1.7)	17,697.0	18,000.0	15	16	John Emmerling, chmn	(212) 751-7460
277	209		**Salthouse-Torre-Norton**, Rutherford, N.J.	2,650.0	3,410.0	(22.3)	41,175.0	48,744.0	41	37	Douglas Salthouse, chmn, ceo	(201) 933-7000
278	288	✓	**Bauerlein**, New Orleans	2,633.5	2,077.8	26.7	18,148.2	14,782.9	42	39	John Green, president, ceo	(504) 522-5461
NR	NR	✓	**Caravetta Allen Kimbrough**, Miami **(BBDO)**	2,614.7	1,647.6	58.7	16,894.8	10,984.0	34	32	Nina Cohen, president	(305) 594-1896
279	259	✓	**Baker Advertising**, Troy, Mich.	2,605.3	2,532.6	2.9	17,377.5	16,892.5	36	40	Ernest W. Baker, chmn	(313) 643-4300
280	217	✓	**Zechman & Associates**, Chicago	2,576.5	3,179.7	(19.0)	16,234.1	17,637.6	26	34	Jan E. Zechman, president	(312) 346-0551
281	291	✓	**Umphenour Martin Lonsdorf**, Atlanta	2,545.7	2,043.5	24.6	19,266.2	15,143.2	28	23	Russell V. Umphenour Jr., chmn	(404) 881-8080
282	212	✓	**Soghigian & Macuga Advertising**, Washington	2,538.4	3,310.0	(23.3)	17,145.3	20,101.0	16	26	Harry Soghigian, chmn	(202) 337-5151
283	282	✓	**Chaffee-Bedard**, Providence, R.I.	2,500.5	2,173.4	15.1	16,678.6	14,496.8	37	33	David S. Chaffee, president	(401) 831-1430
284	228	✓	**BHN Advertising & PR**, St. Louis	2,494.2	3,044.3	(18.1)	17,135.4	19,439.1	54	65	George Gale, president, ceo	(314) 241-1200
285	289	✓	**Lieberman-Appalucci**, Allentown, Pa.	2,479.6	2,069.8	19.8	17,014.7	14,225.6	45	40	Joseph L. Appalucci, chmn	(215) 395-7111
286	270		**Kelley & Wallwork**, Boston	2,475.0	2,325.0	6.5	16,500.0	15,500.0	20	16	Glenn Kelley, president	(617) 439-4399
287	266	✓	**Penny/Ohlmann/Neiman**, Dayton, Ohio	2,474.6	2,413.3	2.5	23,517.0	22,626.3	46	50	Walter Ohlmann, president, ceo	(513) 278-0681
288	254		**Lipman, Richmond, Greene Advertising**, New York	2,473.8	2,636.0	(6.2)	15,526.8	15,961.9	33	32	Richard Lipman, vp	(212) 684-1100
289	277	✓	**Dudreck Depaul Ficco & Morgan**, Pittsburgh	2,440.0	2,250.0	8.4	18,082.5	17,975.0	37	39	Albert W. Dudreck, chmn	(412) 261-2580
290	265		**E.H. Brown Advertising**, Chicago*	2,374.6	2,448.3	(3.0)	15,830.9	16,321.7	27	28	Edward H. Brown Jr., chmn	(312) 372-9494
291	273	✓	**Chester Gore Co.**, New York	2,352.5	2,271.4	3.6	15,442.0	14,888.9	20	21	Chester Gore, president	(212) 754-9111
292	299		**Maris, West & Baker**, Jackson, Miss.	2,276.7	1,952.5	16.6	14,370.0	13,021.5	35	34	Gerrit A. Maris, ceo	(601) 362-6306
293	262		**Spencer Bennett Nowak**, Seekonk, Mass.	2,250.0	2,500.0	(10.0)	15,000.0	16,697.0	28	35	Edward G. Nowak Jr., president	(508) 336-5801
294	310	✓	**Lohman Organization**, New York	2,204.2	1,807.0	22.0	15,397.2	12,105.9	23	22	Arthur J. Lohman, president	(212) 213-4080
295	286		**Stiegler, Wells & Brunswick**, Bethlehem, Pa.	2,201.1	2,140.0	2.9	14,667.3	14,273.8	35	35	Ernie G. Stiegler, chmn	(215) 866-0611
296	331	✓	**Rainoldi, Kerzner & Radcliffe**, San Francisco	2,145.6	1,597.4	34.3	14,262.0	10,622.8	23	20	Joseph C. Rainoldi, president	(415) 398-6222
297	287		**Ovation Marketing**, La Crosse, Wis.	2,144.1	2,095.8	2.3	14,596.0	12,902.7	28	31	Ralph S. Heath III, president	(608) 785-2460
298	327		**Loeffler Ketchum Mountjoy**, Charlotte, N.C.	2,131.7	1,627.4	31.0	14,218.5	10,855.1	35	29	William G. Loeffler, president	(704) 542-8131
299	301		**Solin Associates**, New York	2,117.0	1,942.0	9.0	23,100.0	20,100.0	19	15	Darrol B. Solin, chmn, ceo	(212) 768-7300
300	328	✓	**Martcom Inc.**, Columbus, Ohio	2,102.5	1,620.9	29.7	13,882.9	10,789.0	19	18	Kenneth A. Burke, president, ceo	(614) 457-2400
301	375	✓	**Pagano Schenck & Kay**, Providence, R.I.	2,097.5	1,137.3	84.4	19,072.2	11,032.1	35	26	Robert P. Pagano, president	(401) 456-0650
302	NR		**Rhea & Kaiser Advertising**, Naperville, Ill.	2,085.4	NA	NA	13,909.5	NA	41	37	Stephen L. Rhea, president	(708) 505-1100
303	298	✓	**Michael & Partners**, Dallas	2,062.0	1,974.0	4.5	13,753.0	13,166.0	33	35	George Michael, president	(214) 520-1200
304	NR	✓	**Van Dine Humphrey Herbert Alber & Manges**, Pittsburgh	2,044.2	NA	NA	13,222.0	NA	23	NA	Richard Herbert, president, ceo	(412) 261-4611
305	292		**Rick Johnson & Co.**, Albuquerque, N.M.	2,038.1	2,027.8	0.5	13,575.7	14,334.5	53	50	Eric D. Johnson, president	(505) 266-1100
306	306	✓	**McFarland Group**, Elm Grove, Wis.	2,031.3	1,878.8	8.1	10,877.1	9,848.2	20	20	Mike McFarland, president	(414) 786-5891
307	296	✓	**Letven/Diccicco Advertising & PR**, Horsham, Pa.	2,022.0	1,985.0	1.9	13,467.2	13,100.0	28	35	Edward M. Letven, chpsn, ceo	(215) 957-0300
308	344		**More Direct**, Minneapolis	2,021.0	1,450.0	39.4	13,584.0	9,034.0	22	19	Mark Morris, president	(612) 872-1616
309	295		**Associated Advertising Agency**, Wichita, Kan.	2,017.5	1,996.3	1.1	13,456.6	13,315.1	46	44	Preston D. Huston, president, chmn	(316) 683-4691
310	305	✓	**Aves Advertising**, Grand Rapids, Mich.	2,014.0	1,885.0	6.8	13,010.0	11,875.0	38	34	John C. Aves, president, ceo	(616) 459-3351
311	281	✓	**Detrow & Underwood**, Ashland, Ohio	2,006.7	2,179.1	(7.9)	5,852.0	6,554.2	15	15	Jack M. Detrow, chmn, ceo	(419) 289-0265
312	318		**Harris & Love Advertising**, Salt Lake City	2,002.6	1,720.1	16.4	12,035.1	11,730.8	27	27	Donald G. Ware, president	(801) 532-7333
314	268	✓	**Cole Henderson Drake**, Atlanta	2,000.0	2,400.0	(16.7)	15,200.0	17,300.0	32	34	John H. Drake, president	(404) 237-0057
313	309	✓	**Scharfberg & Associates**, Jenkintown, Pa.	2,000.0	1,827.0	9.5	13,363.3	12,659.7	26	26	Sheldon Scharfberg, president	(215) 885-7050
315	297		**Fern/Hanaway**, Warwick, R.I.	1,985.7	1,975.6	0.5	13,245.0	13,177.3	39	39	Sanford M. Fern, president	(401) 732-6610
316	308		**Bailey Lewis & Associates**, Lincoln, Neb.	1,965.7	1,856.8	5.9	13,108.1	12,382.3	39	36	Richard W. Bailey, chmn, ceo	(402) 475-2800
317	333	✓	**Lee & Riley**, St. Paul, Minn.	1,959.3	1,582.6	23.8	13,045.1	10,540.6	22	20	Dick Lee, president	(612) 647-0384
318	324	✓	**Kaprielian/O'Leary Advertising**, New York	1,952.5	1,650.4	18.3	13,017.3	12,316.7	24	21	Walter Kaprielian, chmn	(212) 696-1300
319	365		**Sandler Communications**, New York*	1,951.5	1,214.1	60.7	12,431.1	7,577.0	30	25	Kenneth Sandler, president	(212) 529-7070
321	NR		**Dawson Johns & Black**, Chicago*	1,950.0	NA	NA	13,000.0	NA	20	NA	R. Powell Johns Jr., president	(312) 670-2200
320	303	✓	**Ken Schmidt Co.**, Milwaukee, Wis.	1,950.0	1,900.0	2.6	12,751.5	11,778.3	33	31	Daniel H. Nelson, chmn, president	(414) 224-0210
322	312	✓	**Simms & McIvor**, Somerville, N.J.	1,945.5	1,805.0	7.8	13,275.0	12,338.0	28	27	Patrick J. McIvor, president	(201) 722-8777
323	293	✓	**Barney & Patrick Advertising**, Mobile, Ala.	1,943.0	2,017.0	(3.7)	12,640.0	13,018.0	20	22	McGowin I. Patrick, president	(205) 433-0401
324	354	✓	**J.P. Hogan & Co.**, Knoxville	1,942.1	1,366.3	42.1	14,347.3	9,108.4	28	22	Joseph P. Hogan, chmn, ceo	(615) 546-7661
325	313		**Penny & Speier**, Houston	1,933.5	1,794.3	7.8	17,960.8	15,428.6	26	27	C.R. Penny, chmn	(713) 965-0331
326	361	✓	**Roni Hicks & Associates**, San Diego	1,928.7	1,291.3	49.4	12,612.5	8,499.0	28	25	Veronica "Roni" Hicks, president	(613) 238-8787
327	340		**John Risdall Advertising**, New Brighton, Minn.	1,918.5	1,511.8	26.9	13,210.0	10,081.0	15	15	John Risdall, president	(612) 631-1098
328	369		**Hal Langerman Co.**, Blue Bell, Pa.	1,909.4	1,182.3	61.5	12,656.0	12,287.3	10	10	Hal Langerman, president	(215) 653-0366
329	304		**Pool Communications**, Los Angeles*	1,890.0	1,900.0	(0.5)	12,600.0	10,700.0	16	16	Harvey Pool, president	(213) 479-4166
330	320		**John Volk Co.**, Chicago	1,883.6	1,710.3	10.1	13,002.8	15,738.2	29	26	John Volk, president	(312) 787-7117
331	336	✓	**Sullivan & Brownell**, Randolph, Vt.	1,865.0	1,561.2	19.5	10,042.7	8,406.5	8	8	Paul J. Sullivan, president	(802) 728-3300
332	300		**Meyer Jehs & Wallis**, Milwaukee	1,863.4	1,946.4	(4.3)	14,593.0	13,899.4	32	28	Robert L. Meyer, president	(414) 224-0212
333	280	✓	**Townsend Agency**, Rosemont, Ill.	1,858.9	2,183.6	(14.9)	12,412.9	14,685.5	23	28	Gary Tillery, chmn	(708) 318-9010
334	317		**Martiny & Co.**, Cincinnati	1,848.2	1,724.2	7.2	12,321.4	11,500.5	26	26	Kim Martiny, president	(513) 784-0400
335	322		**ProClinica Inc.**, New York	1,830.0	1,680.0	8.9	12,150.0	11,200.0	27	31	Mel Snyder, president	(212) 856-6440
336	307	✓	**Sturm Communications Group**, Chicago	1,805.8	1,861.0	(3.0)	12,547.6	12,282.2	28	28	Arthur C. Sturm Jr., president	(312) 943-1881
337	342		**Maleson Advertising**, Owings Mills, Md.*	1,800.0	1,500.0	20.0	12,000.0	10,000.0	18	15	Howard S. Maleson, president	(301) 363-4480
338	368	✓	**Jason Group**, Short Hills, N.J.	1,798.0	1,188.8	51.3	16,970.0	12,280.0	18	18	Art Sasso, president	(201) 379-3535
339	290		**Buyer Advertising**, Newton, Mass.	1,773.3	2,058.6	(13.9)	11,541.6	13,325.4	40	44	Betty R. Buyer, president	(617) 969-4646
340	339	✓	**Francioli Richartz Weiman & Fliss**, Parsippany, N.J.	1,769.6	1,521.0	16.3	11,500.0	9,800.0	15	12	Ron Francioli, creative dir	(201) 299-8090
341	NR		**Saunders & Lyons Advertising**, Buffalo, N.Y.	1,746.3	NA	NA	10,277.1	NA	17	NA	Richard J. Saunders Jr., chmn	(716) 852-1700
342	335	✓	**Phillips, Miller, Speyer & Frost**, Amityville, N.Y.	1,734.7	1,568.2	10.6	11,528.6	10,279.3	26	24	Louis Phillips, chmn	(516) 691-1911
343	341	✓	**Advertising, Boelter & Lincoln**, Madison, Wis.	1,727.4	1,504.6	14.8	10,872.6	10,032.8	33	28	Robert Boelter, president	(608) 251-3381
344	326	✓	**Lewis Communications**, Mobile, Ala.	1,722.6	1,634.5	5.4	1,115.0	11,847.1	31	30	John H. Lewis Jr., chmn	(205) 476-2507
345	334	✓	**Wendt Advertising Agency**, Great Falls, Mont.	1,721.5	1,582.3	8.8	11,549.3	10,579.1	31	30	Stanley F. Meyer, chmn	(406) 452-8581
346	330		**Semel/Kaye & Co.**, Northbrook, Ill.	1,717.5	1,612.5	6.5	10,628.5	10,011.8	21	18	Richard L. Kaye, president	(708) 564-8860
347	315		**Wardrop Murtaugh Temple**, Chicago	1,716.0	1,748.0	(1.8)	10,900.0	11,200.0	21	24	John C. Wardrop, president	(312) 750-9200
348	359		**Jeffrey Nemetz & Associates**, Chicago*	1,700.0	1,300.0	30.8	11,339.0	8,671.0	15	15	Jeffrey Nemetz, president	(312) 664-8112
349	323		**NKH&W Marketing Communications**, Kansas City, Mo.	1,654.0	1,666.0	(0.7)	11,024.0	11,112.0	40	36	F. Peter Kovac, president	(816) 753-8881
350	329	✓	**Rivers Trainor Doyule & Leicht**, East Providence, R.I.	1,640.0	1,620.0	1.2	10,920.0	10,800.0	26	23	Philip R. Rivers, president	(401) 434-9200
351	347	✓	**Sage Marcom**, Syracuse, N.Y.	1,637.9	1,438.0	13.9	10,628.0	9,318.5	38	30	Vincent P. Urciuoli, chmn	(315) 478-6612
352	371	✓	**Harmon Smith**, Kansas City, Mo.	1,634.1	1,178.8	38.6	12,527.2	8,924.6	25	22	Austin Harmon, president	(816) 756-0756
353	349	✓	**Gann-Dawson**, Scranton, Pa.	1,620.8	1,417.7	14.3	10,561.8	9,247.9	22	20	William Dawson, chmn	(717) 343-6551
354	332	✓	**Donald L. Arends Inc.**, Oak Brook, Ill.	1,617.0	1,584.0	2.1	10,785.4	10,565.3	20	22	Donald L. Arends, ceo	(708) 990-0220
355	269		**CPA Inc.**, Key Biscayne, Fla.	1,610.6	2,385.8	(32.5)	10,581.8	15,672.0	19	25	Hugues de Rochefort, chmn	(305) 361-3199
356	353	✓	**Furman Roth Advertising**, New York	1,603.9	1,372.6	16.8	10,692.4	9,150.7	22	21	Ernie Roth, president, coo	(212) 687-2300
357	355		**Armando Testa Advertising**, New York	1,600.0	1,322.0	21.0	10,500.0	9,915.0	20	20	Claude Bosset, exec vp, mgng dir	(212) 683-3030
358	343	✓	**Beckman Associates Advertising**, Albany, N.Y.	1,592.7	1,490.8	6.8	10,898.0	10,701.2	35	35	Richard N. Beckman, chmn, ceo	(518) 465-4573
359	379	✓	**McCormick Advertising**, Amarillo, Texas	1,585.7	1,090.2	45.5	10,728.4	9,239.0	23	22	G. Don Curphey, chmn, ceo	(806) 374-5333
360	387	✓	**Strategic Promotions**, Dallas	1,577.2	1,028.7	53.3	10,518.3	6,860.4	26	24	Grahame R. Hopkins, president	(214) 871-1016

Notes: Dollars are in thousands. NR indicates agency not ranked. Initials in parentheses indicate the parent company in which the subsidiaries' figures are included. See Page S-20 for methodology. See Page S-58 for an alphabetical index. ✓ indicates that the agency received signature of an independent accountant verifying figures supplied to AA. * indicates that gross income and/or total volume figures are AA estimates.

U.S.-based agencies by domestic gross income

Rank				U.S. gross income			U.S. billings		U.S. employees			
1989	1988		Agency, headquarters	1989	1988	% chg	1989	1988	1989	1988	Top executive, title	Telephone
361	314	✓	**Haselow & Associates**, Beachwood, Ohio	1,564.7	1,749.4	(10.6)	10,436.8	11,668.3	23	22	John H. Haselow, president	(216) 831-6060
362	405	✓	**Capener Co.**, San Diego	1,560.0	857.0	82.0	10,170.0	5,519.0	26	18	Bob Capener, president, ceo	(619) 238-8500
363	352		**Sargent & Potratz**, Brookfield, Wis.	1,560.0	1,400.0	11.4	7,800.0	7,000.0	17	12	John Sargent, president	(414) 789-0900
364	337		**Marontate & Co.**, Auburn Hills, Mich.	1,558.0	1,539.0	1.2	10,868.1	10,731.6	20	20	Michael Marontate, president	(313) 373-1700
365	362	✓	**Esrock Advertising**, Orland Park, Ill.	1,540.0	1,280.3	20.3	10,267.0	8,535.0	30	28	Jack Coughlin, president	(708) 349-8400
366	346	✓	**Hiebing Group**, Madison, Wis.	1,539.5	1,439.0	7.0	11,784.2	10,892.6	30	33	Roman Hiebing, president	(608) 256-6357
367	350		**Beaumont, Heller & Sperling**, Reading, Pa.	1,530.5	1,412.5	8.4	10,557.9	9,457.6	40	37	Robert D. Beaumont, president	(215) 375-4311
368	366	✓	**Blake, Walls & Associates**, Los Angeles	1,513.7	1,200.0	26.1	4,900.5	4,137.0	13	10	Beverly Blake, president	(213) 930-9204
369	377	✓	**Ira Thomas Associates**, Youngstown, Ohio	1,492.3	1,108.8	34.6	9,953.0	8,067.5	30	24	Ira D. Thomas, president	(216) 793-3000
370	396	✓	**FKQ Advertising**, Clearwater, Fla.	1,488.6	939.8	58.4	10,181.2	6,678.9	21	18	Robert O. Faller, president	(813) 539-8800
371	316	✓	**Mitchell & Comer**, Toledo, Ohio	1,482.3	1,738.5	(14.7)	10,803.4	12,454.2	22	30	Lee Comer, chmn	(419) 243-7600
372	283		**Schenkein Inc.**, Denver	1,477.0	2,167.0	(31.8)	9,851.0	14,455.0	25	25	Robert A. Schenkein, president	(303) 292-6655
373	345	✓	**G. Temple Associates**, Southfield, Mich.	1,471.2	1,442.9	2.0	9,243.6	9,329.8	19	18	Gerald L. Temple, president	(313) 353-9750
374	386	✓	**Daniel Glassman Advertising**, Fairfield, N.J.	1,465.0	1,029.0	42.4	6,622.0	5,129.0	120	110	Daniel Glassman, president, ceo	(201) 575-3507
375	395	✓	**Cascino & Purcell**, Atlanta	1,463.2	951.8	53.7	9,363.4	6,348.5	13	12	Alfred M. Cascino, president, ceo	(404) 237-9945
376	394		**Significs Inc.**, Rochester, N.Y.*	1,461.2	963.0	51.7	9,745.6	6,422.5	20	18	Douglas Baker, president	(716) 271-2622
377	363	✓	**Grant Marketing Communications**, Lafayette Hill, Pa.	1,450.5	1,275.0	13.8	9,670.3	8,503.0	22	20	Howard C. Grant, chmn, ceo	(215) 834-0550
378	382	✓	**Adams Colway & Associates**, Rochester, N.Y.	1,426.8	1,065.3	33.9	9,219.3	7,490.9	37	26	H. Mat Adams, president, ceo	(716) 325-6830
379	360	✓	**Martz & Wadas**, Scottsdale, Ariz.	1,411.6	1,296.8	8.9	9,000.0	8,500.0	28	22	Carrie A. Martz, president	(602) 998-3154
380	376		**San Jose & Associates**, Chicago	1,406.2	1,121.3	25.4	8,813.8	7,476.8	17	14	George L. San Jose, president	(312) 939-7400
381	398	✓	**Fletcher, Gampper & Wirth**, Kansas City, Mo.	1,403.4	936.0	49.9	10,243.3	7,662.4	23	11	Andy Fletcher, president, ceo	(816) 471-1880
382	383		**Kingswood Advertising**, Ardmore, Pa.	1,338.4	1,050.8	27.4	8,927.3	6,945.0	20	20	Richard L. Moore, president, coo	(215) 896-9260
383	356	✓	**Wolkcas Advertising**, Albany, N.Y.	1,323.6	1,317.0	0.5	8,304.4	8,169.3	19	16	Stewart Sacklow, president	(518) 869-4846
384	373	✓	**Nordensson Lynn Advertising**, Tucson, Ariz.	1,300.5	1,156.8	12.4	8,740.2	7,837.1	30	30	Steve Lynn, ceo	(602) 325-7700
385	348	✓	**Thielen & Associates**, Fresno, Calif.	1,295.0	1,426.1	(9.2)	8,543.5	9,289.9	16	18	Michel C. Thielen, president	(209) 252-2500
386	NR	✓	**Sisti, Zinbarg & Howard**, Paramus, N.J.	1,279.7	NA	NA	4,615.9	NA	18	NA	Marvin Howard, president	(201) 967-1300
387	358	✓	**Topline Design**, Islandia, N.Y.	1,277.0	1,312.6	(2.7)	8,161.2	8,387.6	24	26	Jeanne Fontana Williams, ceo	(516) 348-6969
388	364		**McLaughlin, Del Vecchio & Casey**, New Haven, Conn.*	1,275.0	1,245.0	2.4	8,500.0	8,300.0	16	16	Jim McLaughlin, president	(203) 624-4151
389	414	✓	**Pierson & Flynn**, Chicago	1,266.1	792.9	59.7	8,126.4	5,168.6	12	10	William L. Flynn, president	(312) 644-6090
390	399	✓	**Dugan, Valva Associates**, Fairfield, N.J.*	1,255.9	933.9	34.5	8,323.7	6,189.4	19	14	Peter Dugan, chmn	(201) 227-7396
391	338		**Estey-Hoover**, Newport Beach, Calif.	1,237.6	1,526.7	(18.9)	8,243.6	10,124.3	16	18	Daniel W. Hoover, president	(714) 756-8501
392	351		**Emery Advertising**, El Paso, Texas	1,213.0	1,400.0	(13.4)	7,291.9	8,204.1	24	24	Tom Emery, president	(915) 532-3636
393	367	✓	**Nemer, Fieger & Associates**, Minneapolis	1,209.2	1,197.9	0.9	8,062.0	7,987.0	18	16	James D. Fieger, president	(612) 925-4848
394	380	✓	**Sanna, Mattson, MacLeod & Macri**, Smithtown, N.Y.	1,202.8	1,083.0	11.1	6,380.2	6,060.3	16	14	Robert J. Sanna, president	(516) 265-5160
395	357	✓	**Brett Associates Advertising**, Little Falls, N.J.	1,200.0	1,313.8	(8.7)	1,880.4	2,058.8	11	7	Steven B. Brett, ceo	(201) 890-0500
395	381	✓	**Qually & Co.**, Chicago	1,200.0	1,080.5	11.1	8,000.0	7,500.0	17	17	Robert Qually, president	(312) 944-0237
397	NR	✓	**Goldberg Fossa Seid Advertising**, New York	1,195.6	NA	NA	7,750.0	NA	8	NA	Ira Goldberg, president	(212) 727-7400
398	321	✓	**Gregory Inc.**, Cleveland	1,179.3	1,684.3	(30.0)	7,750.6	11,733.3	19	25	Joseph A. Rini, president	(216) 621-9632
399	404		**Phelps Group**, Los Angeles	1,162.5	870.0	33.6	7,750.0	5,800.0	16	11	Joe Phelps, president	(213) 471-6170
400	389	✓	**Tri-State Advertising Co.**, Warsaw, Ind.	1,157.0	1,023.5	13.0	6,441.3	6,661.4	19	17	William L. Kreicker, president	(219) 267-5178
401	390	✓	**McKee Advertising**, Elk Grove Village, Ill.	1,102.5	1,021.1	8.0	9,469.3	9,023.0	18	20	Edward H. McKee, chmn, ceo	(708) 956-8188
402	403	✓	**Lortz Direct Marketing**, Omaha	1,098.0	897.5	22.3	8,651.0	7,083.5	11	10	Gary Lortz, president	(402) 331-5740
403	409		**Haller Schwarz Meade Ullman**, Agoura Hills, Calif.	1,093.6	833.0	31.3	8,445.2	5,556.0	19	11	H. Schwarz/S. Meade, co-chmn	(818) 889-2973
404	378	✓	**George P. Clarke Advertising**, New York	1,075.6	1,097.7	(2.0)	7,105.3	7,253.2	16	16	George P. Clarke, president	(212) 490-2212
405	393		**Landers & Partners**, St. Petersburg, Fla.*	1,068.6	976.7	9.4	7,026.0	6,424.6	18	15	Samuel Landers, chmn, ceo	(813) 577-6868
406	384	✓	**Tepe, Hensler & Westerkamp**, Cincinnati	1,066.7	1,038.3	2.7	8,684.0	8,209.0	20	19	John Tepe, president	(513) 241-0100
407	374		**Hickman & Associates**, Indianapolis	1,059.5	1,140.1	(7.1)	7,152.0	7,405.8	26	24	Vaughn B. Hickman, president	(317) 843-1113
408	325	✓	**Communication & Design Agency**, Latham, N.Y.	1,058.0	1,642.5	(35.6)	13,012.0	11,756.0	25	25	Francis J. Lipari, president, ceo	(518) 783-0001
409	400	✓	**Delfino Marketing Communications**, Valhalla, N.Y.	1,049.3	930.5	12.8	6,898.8	6,155.0	13	13	Geno B. Delfino, president	(914) 747-1400
410	410		**Carter Callahan Advertising & PR**, San Jose, Calif.	1,026.6	830.1	23.7	7,558.8	6,229.6	12	12	Peter S. Carter, president, ceo	(408) 998-5433
411	388		**Harold Warner Advertising**, Buffalo, N.Y.	1,024.5	1,023.9	0.1	6,800.4	6,724.4	9	9	Harold J. Warner, chmn	(716) 852-4410
412	397		**Coakley Heagerty Cos.**, Santa Clara, Calif.*	1,020.9	938.2	8.8	6,805.9	6,254.4	15	13	John D. Heagerty, president	(408) 249-6242
413	NR		**Katsin Loeb & Partners**, San Francisco	1,013.0	NA	NA	8,998.7	NA	13	NA	Daniel Katsin, president	(415) 399-9960
414	391		**Smith & Yehle**, Kansas City, Mo.	1,011.0	1,001.0	1.0	6,743.7	6,676.9	18	19	Karl J. Yehle, president	(816) 842-4900
415	402	✓	**Kopf Zimmermann Schultheis**, Melville, N.Y.	1,004.3	906.3	10.8	6,185.2	5,593.5	16	15	Arthur Zimmermann, president	(516) 293-6115
416	385	✓	**TCI Advertising**, Stamford, Conn.	1,002.5	1,032.4	(2.9)	7,430.4	7,582.8	16	16	Michael F. Murphy, president	(203) 327-9900
417	425	✓	**Duke Unlimited**, Metairie, La.	996.0	721.0	38.1	6,109.0	5,108.0	13	15	Lana Duke, president, ceo	(504) 836-5150
418	408	✓	**Haynes & Pittenger Direct**, Indianapolis	993.2	853.3	16.4	6,653.3	5,889.5	22	20	Thomas J. Haynes, ceo	(317) 262-4800
419	416	✓	**Stevens Kirkland Kreer**, Chicago	991.5	775.0	27.9	6,612.5	5,166.5	11	9	Henry B. Kreer, president	(312) 372-7868
420	429		**Bruce Novograd Advertising**, New York*	975.0	675.0	44.4	6,500.0	4,500.0	10	6	Bruce Novograd, chmn	(212) 627-2155
421	370		**Laven Fuller & Perkins Advertising**, Chicago	973.5	1,182.2	(17.7)	6,490.0	7,841.2	20	23	James P. Perkins, president	(312) 440-1818
422	392		**Richardson, Thomas & Bushman**, Plymouth Meeting, Pa.	953.7	986.5	(3.3)	6,095.0	6,327.9	14	14	Arthur J. Boyle, president	(215) 834-0430
423	413	✓	**Richard Yeager Associates**, Morristown, N.J.	946.7	806.6	17.4	7,635.4	6,654.4	14	15	Richard A. Yeager, president	(609) 235-5768
424	417		**Noble Arnold & Associates**, Schaumburg, Ill.	944.0	765.0	23.4	6,083.3	4,916.1	14	12	Noble Arnold, president	(708) 605-8808
425	444	✓	**Halbleib & Moll Associates**, Louisville	934.5	594.0	57.3	5,617.6	4,351.9	18	15	Tom Halbleib, president	(502) 585-3403
426	401		**Adelante Advertising**, New York	923.6	923.6	0.0	6,034.0	6,034.0	15	15	Sy Davis, president	(212) 696-0855
427	436	✓	**Hively Agency**, Houston	914.6	633.6	44.4	5,943.7	4,148.8	20	10	Charles Hively, president	(713) 961-2888
428	372	✓	**MacDonald Boyd White**, Boston	909.4	1,169.1	(22.2)	5,846.9	7,639.9	14	16	Terrence M. MacDonald, chmn	(617) 439-7040
429	407		**New-Venture Advertising**, Los Angeles	880.0	854.0	3.0	5,795.5	5,625.4	7	7	Doug Hedlund, president	(213) 473-1547
430	424	✓	**DPL Advertising**, Battle Creek, Mich.	879.1	721.6	21.8	5,639.1	4,577.4	16	14	Perry L. Phillips, president	(616) 979-9191
431	419	✓	**Fischbein & Partners**, Minneapolis*	856.0	759.0	12.8	5,434.4	4,601.0	18	14	Myles Spicer, ceo	(612) 542-9666
432	415	✓	**Praco Ltd.**, Colorado Springs, Colo.	834.8	787.7	6.0	5,566.9	5,164.6	19	19	Jim W. Hall, president	(719) 473-0704
433	435	✓	**Lardis, McCurdy & Co.**, Meriden, Conn.	831.0	635.0	30.9	4,753.0	4,494.0	16	15	John S. McCurdy, president	(203) 235-7040
434	426		**Poindexter Associates**, Roanoke, Va.	829.9	720.4	15.2	6,425.2	4,723.6	11	13	Dale Poindexter, president	(703) 345-2400
435	422	✓	**Perry Ballard/advertising**, St. Joseph, Mo.	823.0	732.6	12.3	5,656.0	4,696.1	19	21	Perry O. Ballard Jr., president	(616) 983-0611
436	423	✓	**Saxton Communications Group**, New York	820.0	730.0	12.3	5,469.4	4,869.1	5	5	Michael J. Enzer, president	(212) 867-2210
437	412		**Gardiner-A Marketing Co.**, Salt Lake City	805.5	813.7	(1.0)	5,372.5	5,427.3	18	17	Harold Gardiner, chmn	(801) 364-5600
438	NR		**Jules Rabin Associates**, Valley Stream, N.Y.*	805.3	NA	NA	5,303.8	NA	22	1	Jules Rabin, president	(516) 561-9160
439	445	✓	**K.I. Lipton Inc.**, Doylestown, Pa.	803.0	588.1	36.5	4,685.2	4,565.8	14	15	Kenneth I. Lipton, president	(215) 345-4525
440	433		**FitzSimons Advertising & Public Relations**, Cleveland	779.5	645.2	20.8	5,199.5	4,208.8	19	15	Daniel A. FitzSimons, president	(216) 241-5656
441	411	✓	**Sheldon Fredericks Advertising**, New York	776.1	829.3	(6.4)	4,988.0	5,373.0	15	16	Frederick A. Schwartz, president	(212) 867-0110
442	448		**Graff Advertising**, Palo Alto, Calif.	771.0	579.2	33.1	4,587.4	3,511.4	10	6	Lloyd L. Graff, president	(415) 856-4040
443	459	✓	**Maged & Behar**, New York*	750.0	450.0	66.7	5,000.0	3,000.0	7	4	Jack M. Maged, president	(212) 463-9629
444	420	✓	**Smith Advertising & Associates**, Fayetteville, N.C.	741.5	750.7	(1.2)	4,852.6	4,850.5	19	18	Gary T. Smith, ceo, president	(919) 323-0920
445	441	✓	**Dusenbury & Alban**, Atlanta	738.5	604.3	22.2	5,669.9	4,875.4	7	8	Ray Alban, chmn	(404) 872-2442
446	476		**Rutkin Costello McCullam Whitley**, New York	725.0	325.0	123.1	4,700.0	2,000.0	6	4	David Rutkin, chmn	(212) 226-2100
447	462	✓	**Shepler/CoDA & Co.**, Hickory, N.C.	722.7	427.7	69.0	4,345.8	2,930.4	13	6	Larry B. Shepler, president	(704) 322-5807
448	434		**Smith & Associates**, Charlotte, N.C.	710.9	644.0	10.4	4,421.3	4,000.0	10	10	Lanny Smith, president	(704) 536-1275
449	443		**Keating Magee Long**, New Orleans	697.0	598.0	16.6	4,280.9	3,667.5	12	10	Jennifer Keating Magee, ceo	(504) 523-2121
450	NR		**Hollingsworth Inc.**, Rockford, Ill.	695.0	NA	NA	4,524.0	NA	12	11	Larry Kobischka, president	(815) 398-7131
451	427	✓	**Kocs, Wesson & Associates**, Brookfield, Wis.	690.0	712.5	(3.2)	4,600.0	4,750.0	9	9	Warren R. Eulgen, president	(414) 786-4402
453	451		**Langworth Taylor Co.**, White Plains, N.Y.*	675.0	540.0	25.0	4,500.0	3,600.0	20	14	Frank C. Langworth, president	(914) 946-7333
452	430		**Don Wise & Co.**, New York	675.0	675.0	0.0	4,500.0	4,500.0	8	8	Donald Wise, president	(212) 371-3333
454	438		**Human Resources Advertising**, Santa Clara, Calif.	673.8	616.0	9.4	3,500.0	3,200.0	13	13	Darrell Batchelder, president, ceo	(408) 748-1000
455	449	✓	**Sader & Associates**, New York	671.0	570.0	17.7	4,473.0	3,800.0	6	6	Archie A. Sader, president	(212) 725-0770
456	NR		**William Jenkins Advertising**, Philadelphia*	658.9	NA	NA	4,240.9	NA	15	NA	Richard J. Look, president	(215) 625-9550
457	442	✓	**Ferrell-Cleary**, Exton, Pa.	635.3	599.4	6.0	4,253.4	4,010.6	10	10	David L. Ferrell, president	(215) 363-1380
458	440	✓	**Advertising & Promotional Services**, Sycamore, Ill.	633.1	612.9	3.3	4,223.5	4,144.8	12	13	Diana L. Leifheit, president	(815) 895-2000
459	446		**Peter Vane Advertising**, New York	632.5	584.0	8.3	4,188.0	3,808.6	8	10	Peter Vane, president, ceo	(212) 679-8260
460	428	✓	**Hull & Signorile**, Florham Park, N.J.	631.4	689.4	(8.4)	4,260.2	4,658.8	6	6	Leonard M. Signorile, president	(201) 514-1888

Notes: Dollars are in thousands. NR indicates agency not ranked. Initials in parentheses indicate the parent company in which the subsidiaries' figures are included. See Page S-20 for methodology. See Page S-58 for an alphabetical index. ✓ indicates that the agency received signature of an independent accountant verifying figures supplied to AA. * indicates that gross income and/or total volume figures are AA estimates.

U.S.-based agencies by domestic gross income

Rank				U.S. gross income			U.S. billings		U.S. employees			
1989	1988		Agency, headquarters	1989	1988	% chg	1989	1988	1989	1988	Top executive, title	Telephone
461	468		**Kert Advertising**, Ft. Lauderdale, Fla.	614.5	381.4	61.1	7,392.2	4,027.1	14	9	Norman Kert, chmn, ceo	(305) 484-4488
462	477		**Severance & Associates**, Nashville*	613.3	320.9	91.1	4,001.0	2,934.0	5	5	Marc Severance, president	(615) 254-1321
463	437		**Exclamation Point**, Billings, Mont.	608.1	630.6	(3.6)	4,054.8	4,216.8	15	15	Janet Cox/John Wilcox, ptnrs	(406) 245-6341
464	406	✓	**Patterson Advertising Agency**, Topeka, Kan.	595.0	854.6	(30.4)	3,661.2	5,585.2	25	31	Donald M. Shurtz, president	(913) 266-3636
465	452	✓	**AIM Inc.**, Foster City, Calif.	593.2	509.8	16.4	3,900.1	3,362.0	7	7	James H. Fieler, president	(415) 349-5555
466	458	✓	**Marken Communications**, Sunnyvale, Calif.	592.5	452.5	30.9	3,951.0	3,017.4	10	10	G.A. Marken, president	(405) 738-1115
467	456	✓	**Gurley Associates**, Rogers, Ark.	588.7	481.9	22.2	3,924.2	3,641.3	13	11	Gordon Gurley, president	(501) 636-4037
468	NR	✓	**Guthrie & Associates**, Greenville, S.C.	579.1	NA	NA	5,390.8	NA	16	NA	David E. Guthrie, president	(803) 235-8479
469	NR	✓	**Tate's Co.**, Malvern, Pa.	572.1	NA	NA	3,363.6	NA	6	NA	James Tate, president	(215) 647-2383
470	432	✓	**MarketAide Inc.**, Salina, Kan.	569.9	647.4	(12.0)	3,803.7	4,318.0	12	16	Gary D. Ray, chmn	(913) 825-7161
471	455	✓	**Smith Group**, Syracuse, N.Y.	566.6	486.5	16.5	3,959.2	3,399.8	6	5	Terrence C. Smith, president	(315) 426-0211
472	479	✓	**Geoghegan/Griffiths**, Cincinnati	565.4	310.0	82.4	3,769.0	2,063.9	14	9	John R. Geoghegan, president	(513) 579-1800
473	450	✓	**DFK Advertising**, New York*	555.0	555.0	0.0	3,700.3	3,700.3	12	12	Herb Fried, president	(212) 696-0766
474	439		**Martin Thomas**, Providence, R.I.	523.7	615.5	(14.9)	3,277.9	4,103.0	9	6	Martin K. Pottle/Thomas R. Rankin	(401) 331-8850
475	431		**Jiloty Communications Inc.**, Holly Hill, Fla.	518.2	663.2	(21.9)	3,370.3	4,308.5	10	10	Michael J. Jiloty, president	(904) 677-0673
476	457		**Bryan/Donald Advertising**, Kansas City, Mo.*	504.0	480.0	5.0	3,360.0	3,200.0	6	5	Donald K. Funk, president	(816) 471-4866
477	453	✓	**James & Thomas**, Chicago	497.0	508.8	(2.3)	3,263.2	3,340.8	9	9	William J. Bloch, president	(312) 751-0520
478	463		**Lubicom**, New York*	495.0	420.0	17.9	3,300.0	2,800.0	26	26	Menechem Lubinsky, president	(212) 302-6677
478	NR		**Tortami Metro P.R.omotions**, Long Island, N.Y.*	495.0	NA	NA	3,300.0	NA	9	8	Fred Greenspan, president	(516) 799-2222
480	NR	✓	**Neiman Group**, Harrisburg, Pa.	488.8	NA	NA	6,950.7	NA	17	NA	Steven H. Neiman, president	(717) 232-5554
481	461	✓	**Kinzie & Green**, Wausau, Wis.	480.7	440.5	9.1	3,075.6	2,805.2	12	12	Kirk E. Howard, president	(715) 845-4251
482	NR	✓	**Kobs Gregory & Passavant**, Chicago	462.3	NA	NA	3,151.6	NA	11	NA	James F. Kobs, chmn, ceo	(312) 819-2300
483	465	✓	**Metro Marketing Group**, Indianapolis	460.9	394.9	16.7	2,953.9	2,070.1	14	7	Albert H. Trestrail, president	(317) 253-1851
484	474		**Stein Killpatrick & Rogan Advertising**, New York	460.5	339.5	35.6	3,846.1	2,193.8	9	9	Thomas Stein, president	(212) 213-1112
485	494	✓	**Integrated Target Marketing**, Chicago	426.5	196.0	117.6	2,838.1	1,387.4	10	5	John M. Coe, president	(312) 527-4995
486	467	✓	**Goff Communications**, Corning, N.Y.	412.0	384.2	7.2	2,747.7	2,562.5	9	8	H. David Goff, president	(607) 962-2431
487	460		**Brewster Advertising**, Cambridge, Mass.	409.0	443.0	(7.7)	2,977.0	3,188.0	5	6	Donald R. Brewster, president	(617) 661-8318
488	478	✓	**MWA Direct**, Minneapolis	408.6	317.7	28.6	2,725.0	2,119.1	4	5	Michael Wikman, president	(612) 522-3673
489	NR	✓	**Opus Group**, Ridgewood, N.J.	404.6	NA	NA	2,690.5	NA	8	8	Joe Grasso, president	(201) 447-4824
490	466	✓	**Hautigan Advertising**, Chicago	403.7	386.9	4.3	2,692.7	2,523.9	5	5	Marie Hoversen, dir client svcs	(312) 777-0424
491	490	✓	**DK Group**, Hillsdale, N.J.	401.2	220.6	81.8	2,128.5	1,471.3	8	8	Richard Knel, president	(201) 358-6100
492	447	✓	**CTS Associates**, Detroit	399.9	581.7	(31.3)	2,426.5	4,767.7	7	9	C. Thomas Scholl, president	(313) 965-0575
493	454	✓	**Hinton & Steel**, Seattle	393.3	492.5	(20.1)	2,622.9	3,284.6	10	10	Dennis D. Hinton, president	(206) 441-3455
494	NR		**NPC & Associates**, Landover, Md.	386.5	NA	NA	2,457.5	NA	10	9	Nathaniel Pope Jr., president	(301) 925-9475
495	471		**MSA Advertising**, Philadelphia	379.4	360.2	5.3	3,238.8	3,267.0	7	7	Michael Schwartz, ceo	(215) 546-8000
496	464		**Ruhe & Co.**, Reading, Pa.	356.4	401.6	(11.3)	1,670.6	1,814.0	6	6	Bob Ruhe, president	(215) 373-4267
497	486	✓	**Burgess, Brewer, Stanyon & Payne**, Portland, Maine	355.2	245.0	45.0	2,277.6	1,632.1	12	8	Meredith Strang Burgess, president	(207) 775-5277
498	481	✓	**G. Duff Associates**, Somerville, N.J.	339.2	309.0	9.8	2,307.4	2,029.2	4	4	Glee A. Duff, president	(201) 874-0500
499	473	✓	**Creel Associates**, Oak Brook, Ill.	334.0	339.9	(1.7)	2,328.6	2,371.4	9	10	David R. Creel, president	(708) 990-0402
500	475	✓	**Cross Keys Advertising**, Doylestown, Pa.	325.1	338.9	(4.1)	3,269.3	4,090.8	7	6	Laura A. Thompson, president	(215) 345-5435
501	480	✓	**R.J. Hunter & Associates**, Exton, Pa.	318.0	310.0	2.6	2,120.0	2,048.0	7	7	Raymond J. Hunter, president	(215) 363-0606
502	485	✓	**J. Malek Inc.**, New York	309.6	252.6	22.5	1,936.8	1,585.6	9	9	Judy Malek, president	(212) 465-9304
503	470	✓	**Bonnie Dean Associates**, Greeley, Colo.	301.3	364.9	(17.4)	1,955.6	2,370.6	8	8	Bonnie Dean, president	(303) 356-3221
504	488	✓	**Mycomm Advertising**, Chicago	287.7	223.5	28.7	1,848.0	1,476.3	7	6	Roger Myers, president	(312) 372-7272
505	482		**Rik Shafer & Associates**, Northport, N.Y.*	280.6	280.6	0.0	1,800.0	1,800.0	7	6	Rik Shafer, president	(516) 754-1750
506	NR	✓	**Pollak Levitt Chaiet**, Atlanta	276.9	NA	NA	1,837.6	NA	9	NA	James S. Pollak, president	(404) 261-1566
507	487		**Mike Sloan's Matterhorn Advertising**, Miami	270.0	230.0	17.4	1,800.9	1,534.1	2	2	Mike Sloan, president, ceo	(305) 666-7138
507	484		**Varon & Associates**, Birmingham, Mich.	270.0	257.1	5.0	1,800.0	1,714.2	6	6	Jerry Varon, president	(313) 645-9730
509	472	✓	**William Mills Advertising & Marketing**, Atlanta	268.2	340.6	(21.3)	1,011.7	1,614.9	8	10	William E. Mills Jr., president, chmn	(404) 261-4900
510	499		**Killian & Co.**, Chicago	263.7	173.0	52.4	1,748.3	1,153.7	5	2	Robert J. Killian, president, ceo	(312) 836-0050
511	489		**Jack Mathis Advertising**, Libertyville, Ill.	253.3	220.7	14.8	1,666.0	1,451.1	3	3	Jack Mathis, president	(708) 367-1826
512	498		**L. Quillin & Associates**, La Crosse, Wis.	240.1	173.6	38.3	1,541.1	1,101.1	6	5	Lawrence J. Quillin, president	(608) 788-8292
513	495		**Lawrence Kaplan Advertising**, Richmond, Va.	236.0	194.3	21.5	1,740.8	1,265.4	4	4	Lawrence Kaplan, president	(804) 288-2826
514	491	✓	**Adams & Longino Advertising**, Greenville, N.C.	235.9	216.6	8.9	1,544.0	1,041.4	5	4	Charles P. Adams Jr., president	(919) 355-5566
515	483	✓	**Hicks & Associates**, Coral Gables, Fla.	224.5	263.8	(14.9)	1,214.6	1,528.2	2	3	Donald J. Hicks, president	(305) 444-7463
516	496		**Griffith & Coe Advertising**, Hagerstown, Md.*	219.0	190.5	15.0	1,082.1	986.1	9	8	John L. Griffith Jr., president	(301) 733-7286
517	469	✓	**Blackwood Agency**, Okemos, Mich.	207.7	372.1	(44.2)	1,380.6	2,470.1	5	5	J. Ronald Gaffe, president	(517) 349-6770
518	418	✓	**Bradford Advertising & PR**, Old Saybrook, Conn.	204.9	763.8	(73.2)	3,093.2	5,102.4	6	6	Wilson G. Bradford, ceo	(203) 388-1282
519	493		**Everett, Brandt & Bernauer**, Kansas City, Mo.	185.0	205.4	(9.9)	1,197.1	1,323.2	6	7	James A. Everett, president	(816) 421-0000
520	501		**Clarke Advertising & PR**, Bradenton, Fla.	183.6	146.7	25.1	1,223.7	978.3	9	6	Timothy J. Clarke, president	(813) 753-6047
521	497	✓	**Cedarcrest Advertising**, Bellevue, Wash.	181.7	187.8	(3.3)	1,211.0	1,252.0	3	3	Mark Rutledge, marketing mgr	(206) 453-1323
522	504	✓	**Marketing Lab**, Danbury, Conn.	181.3	105.6	71.8	1,338.3	868.6	10	9	Allen Flouton, president	(203) 790-7939
523	500		**Keller Haver Lipman**, New York*	173.8	165.0	5.4	1,135.0	966.0	4	4	Gerald Keller, president	(212) 684-1100
524	NR		**Harrison Advertising**, Warrenville, Ill.	162.3	NA	NA	966.8	NA	4	NA	Glenn Harrison, president	(708) 393-4404
525	492		**Halcyon Associates**, New York	160.0	210.0	(23.6)	1,200.5	1,500.0	4	6	Donald Fleck, president	(212) 629-3535
526	NR		**Phillips Marketing**, San Diego	122.0	NA	NA	813.7	NA	3	NA	Robert B. Phillips, president	(619) 223-5353
527	502		**Mills Marketing**, Los Angeles	96.6	121.6	(20.6)	860.1	775.1	3	3	Ezra Millstein, president	(213) 223-1178
528	503	✓	**Shea & Ziegler**, Darien, Conn.	94.7	109.6	(13.6)	634.2	741.1	1	1	Michael S. Ziegler, president	(203) 655-9100
529	NR		**Miller Group**, Los Angeles*	82.5	NA	NA	550.0	NA	3	3	Renee Miller, president	(213) 273-5173
530	NR		**Hahn, Crane & Associates**, Evanston, Ill.*	76.0	NA	NA	496.9	NA	2	NA	Fred E. Hahn, president	(708) 866-9009
531	505		**Communication Plus Advertising/PR**, Richardson, Texas*	58.2	54.9	6.0	381.7	363.1	3	3	Ed Fries, ceo, mnging ptnr	(214) 283-8543
532	NR	✓	**Breakstone & Associates**, Greenwich, Conn.	53.8	NA	NA	1,192.0	NA	5	5	Elaine Breakstone, president	(203) 622-0388
533	506	✓	**McAndrew Advertising Co.**, Bronx, N.Y.*	37.7	42.2	(10.7)	242.0	269.0	3	5	Robert McAndrew, president	(212) 892-8660

Notes: Dollars are in thousands. NR indicates agency not ranked. Initials in parentheses indicate the parent company in which the subsidiaries' figures are included. See methodology below. See Page S-58 for an alphabetical index. ✓ indicates that the agency received signature of an independent accountant verifying figures supplied to AA. * indicates that gross income and/or total volume figures are AA estimates.

Methodology to domestic & international rankings

Some of the material in this issue represents a shift in how *Advertising Age* ranks the global community of ad agencies.

The "world's Top 100 agencies by gross income" chart *(Page S-6)* reflects the international marketing community's growing activity in Europe and the Pacific Rim. Of the Top 100 agencies worldwide, 28 are Pacific Rim, 18 are European and 46 U.S.

Prior to this year's report, which ranks agencies regardless of country of origin, the primary ranking was U.S.-based agencies by worldwide gross income. Since only 38 U.S. agencies have international billings, and most are among the world's Top 100, AA prepared another table that ranked all U.S. agencies only by domestic gross income *(Page S-14)*. *This ranking parallels the listing of more* than 1,066 foreign agencies from 76 countries ranked within their respective countries *(Page S-24)*.

Ad Age eliminated what is referred to as "double-dipping" by U.S. subsidiary agencies. This practice permitted both a parent agency and its subsidiary to be ranked on the same chart, the parent claiming the subsidiary and its own income figure, and the subsidiary, separating its figures from the parent's and claiming itself.

Double-dipping tended to add confusion since it began in the early '80s with the rapid consolidation of agencies. Last year, 26 agencies in the Top 100 U.S. agencies chart based on worldwide gross income were double-dipped, thereby denying 26 other agencies a higher ranking and entry to this elite chart.

To avoid eliminating listings of consolidated subsidiaries, AA is showing its results in the chart "U.S.-based agencies *by domestic gross income*" *(Page S-14)*. Here the subsidiary is placed in the ranked spot it would have occupied had it not been included in its parent's total, but it receives no ranking (NR).

Nevertheless, a few double-dippers remain. Agencies qualify for ranking if they hold at least 50% of their equity. Their ranking is based on 100% of their returns. A parent agency is allowed to claim its ownership percentage of a unit's gross income and billings. Hence, some of the returns of a ranked agency show up in those of the ranked parent. A parent's equity in a subsidiary is defined as MJ for majority, MN for minority, NE for non-equity, JV for joint venture, NA for not applicable and ND for not declared. Not all subsidiaries are double-dipped. For example, Levine, Huntley, Schmidt & Beaver is a subsidiary of Grey Advertising but is not included in Grey's totals. Non-U.S. results of unranked subsidiaries appearing on the U.S. domestic *gross income chart do not show up. Those* results can be found in the footnotes to the chart, "U.S. agencies with foreign billings" *(Page S-32)*.

Billed media rankings

Ranking by media category *(Page S-56)* is based on the parent's consolidated total. Where the parent's total for a given medium includes a subsidiary's contribution of 50% or more, that unit is noted.

Questionnaire: Gross income, volume

Data, including gross income and volume, were obtained by questionnaire.

Gross income in the traditional agency structure is the sum of media commissions earned from media billings, the markup (usually 17.65%) for materials and services billed the client and the raw fee. Some agencies may provide only billings or miscalculated gross income, requiring *Ad Age* to estimate gross income.

Volume is the sum of media billings, billings to the client for materials and services and capitalized fees—a method of equating fees to billings by treating the raw fee as if it were a 15% media commission. When agencies did not break out their U.S. billings by office, those numbers were estimated and the agency was contacted for comment.

This year marks the sixth year in which agencies provided verification from an independent accountant for figures they reported. Such verification does not require an audit. Those agencies providing a signature were noted by a check mark accompanying their entry on the chart ranking U.S. agencies by gross income.

Exchange rates

Agencies converted local currency to dollars using average annual exchange rates provided by AA and shown at the beginning of each country's ranking beginning on Page S-24. A different rate is provided for the two comparable years (1989 and 1988), providing an historic reading of the prior year. AA adjusted rates for inflation-plagued Brazil and Argentina after questionnaires were returned. ☐

Foreign agencies by 1989 gross income

Argentina Exchange rates: 0.01414 0.10253 austral

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
J. Walter Thompson Argentina, Buenos Aires	MJ	18,933	NA	126,281	NA
Lautrec/Saatchi & Saatchi, Buenos Aires	NE	12,862	NA	51,450	NA
Funes, Straschnoy, Dreyfuss Y&R, Buenos Aires	MN	12,213	NA	81,461	NA
Colonnese:Lintas, Buenos Aires	MJ	11,701	NA	78,043	NA
Graffiti DMB&B, Buenos Aires	MN	11,340	NA	63,036	NA
McCann-Erickson, Buenos Aires	MJ	9,245	NA	61,666	NA
Ortiz, Scopesi y Cia., Buenos Aires	MJ	8,686	NA	59,902	NA
Pragma/FCB Publicidade, Buenos Aires	MN	7,425	NA	49,522	NA
Leo Burnett Co., Buenos Aires	MJ	6,313	NA	41,807	NA
Fontanarrosa, Capurro & Asociados, Capital Federal	NA	4,947	NA	22,826	NA
David Ratto/BBDO, Buenos Aires	MN	4,674	NA	31,175	NA
Gowland Publicidad, Buenos Aires	NA	2,794	NA	12,651	NA
Casares Grey, Buenos Aires	ND	1,879	NA	7,516	NA
Ayer Vasquez, Buenos Aires	MN	614	NA	4,095	NA

■ **Notes:** Due to extreme fluctuations in the austral rate, AA did not compute percentage changes for 1989 and 1988 for gross income and billings; Ayer Vasquez 10% owned by N W Ayer; Graffiti DMB&B 5% owned by DMB&B; David Ratto/BBDO 20% owned by BBDO Worldwide; Pragma/FCB 20% owned by Foote, Cone & Belding; Lautrec/Saatchi & Saatchi non equity affiliation; Ortiz Scopesi y Cia. minority owned by Ogilvy & Mather. Cicero/Ted Bates did not supply figures.

Australia Exchange rates: 0.80034 0.75470 Australian dollar

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
George Patterson Pty., Sydney	MJ	76,833	27.3	512,218	30.5
Clemenger/BBDO, Melbourne	MN	52,011	20.8	325,068	20.8
Chiat/Day/Mojo, Sydney	MJ	32,157	42.1	200,916	42.1
Young & Rubicam, Sydney	MJ	30,401	31.1	202,774	31.1
HDM Mattingly, Melbourne	MJ	29,695	NA	188,080	NA
DDB Needham, Sydney	MJ	29,164	18.8	194,527	22.7
Neville Jeffress Advertising, Sydney	NA	20,781	25.6	138,539	25.1
McCann-Erickson, Sydney	MJ	20,117	23.6	134,176	23.6
DMB&B, Sydney	MJ	18,553	31.7	126,702	28.2
Saatchi & Saatchi Advertising, Sydney	MJ	17,334	13.4	106,125	24.6
J. Walter Thompson Australia, Sydney	MJ	14,775	56.6	98,550	56.6
Ogilvy & Mather, Melbourne	MJ	14,144	3.2	97,542	6.7
Foote, Cone & Belding, Sydney/Melbourne	MJ	12,803	24.0	85,398	24.0
Lintas:Australia, Sydney	MJ	12,271	6.4	81,848	6.4
Leo Burnett Ltd., Sydney	MJ	11,651	22.6	77,678	22.6
Dentsu Australia, Sydney	MJ	10,909	NA	68,589	NA
Ball Partnership, Sydney	MJ	7,629	19.8	50,888	19.8
SSB Advertising, Sydney	MJ	7,121	(6.3)	44,618	(6.0)
Connaghan & May, Sydney	NA	7,028	23.4	46,878	23.4
Charlton & Charlton, Sydney	NA	6,777	61.0	42,356	66.3
Magnus Nankervis & Curl, Sydney	NA	6,731	23.9	42,074	23.3
Grey Australia, Sydney	MJ	5,994	(0.8)	39,978	(0.8)
John Singleton, Sydney	NA	5,150	13.7	33,784	14.8
McCarthy Watson & Spencer, Sydney	NA	4,722	73.8	29,533	67.2
Luscombe & Partners, Melbourne	NA	4,482	41.7	26,411	57.6
Thomson White & Partners, Melbourne	NA	4,148	40.2	27,652	40.2
Samuelson Talbot & Partners, Sydney	NA	4,094	399.0	26,955	45.9
Hertz Walpole, Sydney	MN	3,553	26.0	23,688	26.0
Pemberton Australia, Sydney	NA	2,798	NA	15,126	NA
Moffatt Sharp Advertising, Melbourne	NA	2,632	7.0	13,497	0.0
Harris Robinson & Associates, Sydney	NA	1,901	NA	12,064	NA
Scali, McCabe, Sloves, Melbourne	MJ	1,564	(4.1)	7,266	(12.1)
Bozell Rydge, Waverton	MJ	1,521	NA	8,804	NA
FCB/Shorter, Perth	MN	1,209	63.7	8,061	63.7
FCB/Hocking, Adelaide	MJ	855	(16.7)	5,704	(16.7)

■ **Notes:** George Patterson Pty. figures include data for the Campaign Palace and Marketforce; Chiat/Day/Mojo figures include Sydney, Melbourne, Perth and Brisbane offices; Dentsu Australia, formerly Fortune Communication Holdings, was acquired by Dentsu Inc. last year; Hertz Walpole 48% owned by Lowe Group; Bozell Rydge shows annualized figures, based on first 5 months' operation; Young & Rubicam figures includes Wunderman, Cato-Johnson, Sudler & Hennessey and Burson-Marsteller; gross income and billings figures for Neville Jeffress, Connaghan & May, SSB Advertising, John Singleton, McCarthy Watson & Spencer, Thomson White & Partners, Samuelson Talbot & Partners and Charlton & Charlton are AA estimates.

Austria Exchange rates: 0.07555 0.08149 schilling

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
GGK Vienna/Salzburg, Vienna/Salzburg	MJ	8,386	1.4	55,930	13.1
Demner & Merlicek, Vienna	NA	8,016	5.7	53,467	5.7
Lintas:Austria, Vienna/Salzburg	MJ	7,611	10.5	50,764	10.5
Werbeagentur Wirz, Vienna	MN	7,404	9.5	49,384	9.5
Ogilvy & Mather, Vienna	MJ	5,881	15.7	40,560	19.6
Saatchi & Saatchi Advertising, Vienna	NE	5,213	10.3	34,866	27.3
McCann-Erickson, Vienna	MJ	4,876	(4.8)	32,520	(4.8)
HDM Dorland, Vienna	MN	4,261	36.9	28,421	36.8
Grey Austria, Vienna	MJ	4,163	(1.0)	34,073	21.5
Dr. Puttner & Ted Bates, Vienna	MJ	4,049	24.5	28,467	22.4
Young & Rubicam, Vienna	MJ	4,011	9.4	40,727	66.5
Team/BBDO, Vienna	MJ	3,944	26.4	26,307	26.4
MMS Werbeagentur, Linz	NA	3,181	(4.1)	21,456	(2.8)
Haupt-Stummer/J. Walter Thompson, Vienna	MJ	2,587	74.7	17,257	74.7
Bozell Publicitas, Vienna	MN	2,478	67.1	16,621	13.3
RSCG Jesch & Schramm, Vienna	MJ	2,200	3.0	14,010	13.5
R.W. Eggert, Vienna	NA	2,100	(8.3)	14,007	(15.9)
Publicis Wien, Vienna	MJ	2,055	25.5	17,976	12.5
DMB&B, Vienna	MJ	1,929	(0.9)	14,260	3.5
DDB Needham Heye & Partner, Vienna	MJ	513	(36.6)	3,422	(23.0)
Conquest Europe, Vienna	MJ	216	9.0	1,423	7.6
Campbell Ewald, Vienna	MJ	31	(16.2)	205	(16.2)

■ **Notes:** Haupt-Stummer/JWT acquisition took place June 1989.

Bahrain Exchange rates: 2.64271 2.64000 dinar

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Fortune Promoseven, Manama	NA	9,414	17.6	62,759	17.6
Radius Advertising, Manama	NE	1,242	(9.3)	8,280	(9.4)
Madco Bahrain, Manama	NA	945	4.8	3,700	15.6

■ **Notes:** Fortune Promoseven Network offices in Saudi Arabia, Kuwait, Dubai, Egypt, Lebanon, the U.K. and France; Radius Advertising non equity affiliation with Leo Burnett Co.

Barbados Exchange rates: 0.49719 0.49890 Barbados dollar

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Lonsdale/Saatchi & Saatchi, St. Michaels	MN	478	68.8	3,188	74.4

Belgium Exchange rates: 0.02543 0.02749 Belgian franc

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
McCann-Erickson Belgium, Brussels	MJ	15,232	17.6	101,598	17.6
BSB Brussels, Brussels	MJ	14,702	12.0	98,012	37.9
HHD Ogilvy & Mather, Brussels	MJ	13,466	14.1	92,694	17.8
DMB&B, Brussels	MJ	11,984	6.7	79,934	6.7
HDM Belgium, Brussels	MJ	9,003	0.8	60,052	0.8
Lintas:Brussels, Brussels	MJ	8,460	10.0	56,431	10.0
Young & Rubicam Belgium, Brussels	MJ	7,473	5.2	49,848	5.2
J. Walter Thompson Co., Brussels	MJ	6,940	(8.8)	46,348	(8.8)
Lowe Troost, Brussels	MJ	6,913	(11.6)	46,085	(11.6)
Publicis.FCB, Brussels	MJ	6,761	17.4	45,088	17.4
DDB Needham, Brussels	MJ	5,896	7.8	39,325	(12.7)
Grey, Brussels	MJ	5,865	5.5	39,119	5.5
Leo Burnett-Belgium, Brussels	MJ	5,848	17.2	39,004	17.3
VVL/BBDO, Brussels	MJ	5,264	16.9	35,111	16.9
Garbarski RSCG, Brussels	MJ	4,756	13.1	39,226	13.3
LVH Alliance, Brussels	MJ	3,698	(7.5)	24,670	(7.5)
TBWA Belgium, Brussels	MJ	3,433	19.0	22,890	19.0
Moors Bronselaer, Brussels	MJ	2,391	25.5	15,948	25.5
Saatchi & Saatchi/FDBP, Brussels	MJ	2,143	29.8	15,292	39.0
BDDP/Booster, Brussels	MJ	1,507	87.3	10,038	87.0
Media Team, Brussels	MJ	1,402	(1.8)	9,353	(1.8)
Mirror/GGK Brussels, Brussels	MJ	1,352	NA	9,156	NA
Lenders Deroost Katte/EWDB, Brussels	MJ	966	(2.3)	8,902	7.9
Morael & Partners, Antwerp	MJ	965	(5.3)	6,438	(5.3)
FCA! Heslop Beguivin, Brussels	MJ	712	NA	4,756	NA
Mundo Direct, Brussels	MJ	510	(21.9)	3,403	(21.9)
Conquest Europe, Brussels	MJ	304	5.9	2,030	5.9
Anthonissen & Associates, Brussels	MJ	236	144.0	1,577	144.0

■ **Notes:** McCann-Erickson Belgium includes data for Universal Media; HDM Belgium includes HDM Dechy, HDM Dechy Intl., GRPO and Forum; J. Walter Thompson Co. includes Actuel, JWT Creative Group and Blow-Up; Mundo Direct part of Publicis-FCB; Young & Rubicam includes Wunderman, Cato-Johnson and Burson Marsteller; Anthonissen & Associates, Morael & Partners, Media Team and Moors Bronselaer, all majority owned by BBDO Worldwide.

Bermuda Exchange rates: 1.00000 1.00000 Bermuda dollar

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Advertising Associates Compton, Hamilton	NE	1,965	19.1	13,108	19.8

Botswana Exchange rates: 1.87700 0.00000 pula

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Horizon Advertising, Gaborone	NE	338	NA	1,126	NA

■ **Notes:** Horizon Advertising affiliated with Saatchi & Saatchi Advertising.

Brazil Exchange rates: 0.35250 3.43260 cruzado

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
MPM Propaganda, Sao Paulo	NE	83,876	NA	220,689	NA
Alcantara Machado, Periscinoto/BBDO, Sao Paulo	MN	37,969	NA	144,140	NA
Duailibi, Petit, Zaragoza, Sao Paulo	NA	34,616	NA	139,590	NA
Standard Ogilvy & Mather, Sao Paulo	MJ	31,200	NA	215,176	NA
Lintas:Brazil, Sao Paulo	MJ	25,521	NA	170,228	NA
McCann-Erickson Brazil, Sao Paulo	MJ	25,233	NA	168,305	NA
Norton Publicidade, Sao Paulo	NE	24,202	NA	96,808	NA
Salles/Inter-Americana, Sao Paulo	NA	21,986	NA	109,929	NA
J. Walter Thompson Publicidade, Sao Paulo	MJ	16,880	NA	84,398	NA
Young & Rubicam do Brasil, Sao Paulo	MJ	12,146	NA	81,015	NA
FCB/Siboney Publicidade, Sao Paulo	MJ	7,113	NA	47,443	NA
Better Comunicacao, Sao Paulo	NE	7,006	NA	35,070	NA
GTM&C, Sao Paulo	NA	4,135	NA	24,144	NA
Futura/Scali, McCabe, Sloves, Sao Paulo	MJ	3,523	NA	15,336	NA
Nucleo Publicidade, Sao Paulo	NA	3,275	NA	15,828	NA
Leo Burnett Publicidade, Sao Paulo	MJ	2,114	NA	39,986	NA

■ **Notes:** Due to the extreme fluctuations in the Brazilian cruzado rate, AA did not compute percentage changes for 1989 and 1988 for gross income and billings; Better Comunicacao non-equity affiliation with Saatchi & Saatchi Advertising; McCann-Erickson Brazil includes figures for Interpublic; CBBA/Propeg, part of J. Walter Thompson Co., did not submit figures; Young & Rubicam do Brasil includes Burson-Marsteller. Y&R dissolved its association with Fischer, Justus in 1989; ALMAP/BBDO Comunicacoes 19.9% owned by BBDO Worldwide; Norton Publicidade non-equity affiliation with Bozell; Denison Propaganda affiliated with Backer Spielvogel Bates, did not submit figures.

Britain Exchange rates: 1.67424 1.77170 pound

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Saatchi & Saatchi Advertising, London	MJ	156,347	12.6	1,042,256	(2.6)
Ogilvy Group, London	MJ	90,451	8.7	623,800	15.4
J. Walter Thompson Co., London	MJ	84,792	17.6	568,404	9.8
Young & Rubicam Holdings, London	MJ	82,527	22.6	550,462	22.6
Grey Communications Group, London	MJ	81,072	12.4	540,747	12.4
BSB Dorland, London	MJ	79,575	(0.1)	530,366	(0.2)
DMB&B, London	MJ	66,126	9.0	514,283	20.4
McCann-Erickson U.K., London	MJ	60,033	4.0	400,440	4.0
BMP DDB Needham, London	MJ	53,050	177.5	353,844	168.1
Lowe Howard-Spink, London	MJ	43,018	1.8	286,787	1.8
Collett Dickenson Pearce, London	MJ	39,085	22.5	269,553	24.7
WCRS Mathews Marcantonio, London	MJ	38,340	18.9	255,656	19.0
Leo Burnett Ltd., London	MJ	30,135	25.6	200,909	25.6
Publicis, London	MJ	29,467	28.9	196,723	29.0
KHBB, London	MJ	27,792	14.3	185,338	14.3
Abbott Mead Vickers SMS, London	NE	25,758	8.9	194,379	9.4
Gold Greenlees Trott, London	NA	24,444	10.4	164,410	15.3
Allen Brady & Marsh, London	MJ	23,761	5.7	158,400	5.7
Austin Knight, London	NA	23,038	20.4	153,612	20.4
Lowe Bell Communications, London	MJ	22,281	38.3	148,542	38.3
Arc Advertising, London	NA	21,598	56.3	143,985	56.3
Bartle Bogle Hegarty, London	NA	21,430	12.8	159,220	25.7
Yellowhammer, London	NA	21,280	22.4	141,808	22.4
SPCTD:Lintas, London	MJ	20,749	3.6	138,393	3.6
Alliance International (UK), London	MJ	20,091	(3.1)	133,939	(3.1)
FCB Advertising, London	MJ	19,254	7.6	130,591	10.0
DFSD/Bozell, London	MN	18,433	NA	122,889	NA
HDM London, London	MJ	16,701	18.1	108,782	19.6
Watson Ward Albert Varndell, London	NA	13,695	8.5	91,246	8.4
Riley Advertising, London	NA	11,954	8.8	79,694	8.9
Graham Poulter Partnership, London	NA	11,887	24.0	79,058	23.7
TBWA, London	MJ	11,799	28.0	78,689	28.0

Gross income and billings in $(000).

Britain (continued)

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Colman RSCG, London	MJ	11,383	14.7	107,319	20.2
Cogent Elliott, London	NA	11,301	6.3	75,341	6.3
Woollams Moira Gaskin O'Malley, London	NA	11,201	445.0	74,671	445.9
Mavity Gilmore Jaume Hill Brooks FCA!, London	MJ	11,050	55.9	73,667	54.0
GGK London, London	MJ	10,198	20.0	68,020	20.0
Butterfield Day Devito Hockney, London	NA	10,112	93.5	67,438	93.7
Bowden Dyble Hayes & Partners, London	NA	9,610	14.6	64,040	14.6
Ayer/Great Britain, London	MJ	9,370	0.4	62,500	5.1
Burkitt Weinreich Bryant Clients, London	NA	8,154	17.7	54,312	17.6
BBDO, London	MJ	7,900	(3.7)	52,670	(6.3)
BDDP/Waldron Allen Henry Thompson, London	MJ	5,458	(3.7)	36,351	(4.5)
CDP Financial, London	MJ	4,920	0.1	32,798	0.1
Valin Pollen, London	NA	4,621	(18.2)	30,806	(18.2)
FCO, London	MJ	4,192	15.1	36,403	12.0
Travis Dale, London	MJ	3,867	1.1	25,783	1.1
The F. John French Agency, London	NA	3,767	7.4	20,928	7.4
Services Division, London	MJ	3,710	20.1	24,729	20.1
GJW, London	MJ	3,549	42.4	23,662	42.4
Park Ltd., London	MN	2,630	16.9	18,931	15.6
WCRS/dma, London	MJ	2,038	19.5	6,027	54.6
Chiat/Day/Mojo, London	MJ	2,009	90.3	13,394	90.2
The Wight Co., London	MJ	1,885	94.2	12,569	94.1
International Poster Management, London	MJ	1,865	99.8	12,436	99.7
NWA Ltd., London	NA	573	NA	3,819	NA

■ **Notes:** Alliance International UK consists of ASL Alliance, St. James Alliance and WBH Alliance; F. John French gross income for both years AA estimates. Park part of Crossworld Intl. Agency Partnership. NWA affiliated with N W Ayer; Travis Dale majority owned by Collett Dickenson Pearce. Gross income both years AA estimates. CDF Financial gross income both years AA estimates; KHBB part of Saatchi & Saatchi network. Figures are not included in Saatchi & Saatchi Advertising. SPCTD/Lintas merger took place in 1989. Included in figures are Addition Marketing Group, Tweak and Initiative Media. McCann-Erickson UK includes Harrison Advertising, Advertising Ltd., Photo-Video, Intercompany Administrative & Computing Services, Direct, M/E Universal UK, M/E Royds, EPIC, Sales Desk and Scotland BDF. Publicis includes McCormick Publicis, Manchester. FCB Advertising includes Garratt Baulcombe and FCB Direct. Allen Brady & Marsh, Lowe Howard-Spink, Lowe Bell Communications, Services Division, GJW, Intl. Poster Management and The Wight Co., all part of the Lowe Group. Also, gross income for both years for these agencies AA estimates. Young & Rubicam includes Wunderman, Cato-Johnson, Sudler & Hennessey, Landor and Burson-Marsteller. Austin Knight, ARC Advertising, Yellowhammer, Watson Ward Albert Varndell, Riley Advertising, Graham Poulter Partnership, Cogent Elliott, Woollams Moira Gaskin O'Malley, Butterfield Day Devito Hockney, Bowden Dyble Hayes & Partners, Burkitt Weinreich Bryant Clients and Valin Pollen, gross income for both years AA estimates. Billings for these agencies were published in Campaign Magazine's Top 300 Agencies chart, Feb. 23. DFSD/Bozell 1989 merger between Delaney Fletcher Delaney and Slaymaker Cowley White/Bozell.

Cameroon Exchange rates: 0.00319 0.00300 CFA

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Lintas:Cameroon, Douala	MN	532	11.5	3,549	11.4

Canada Exchange rates: 0.8388 0.80230 Canadian dollar

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
McCann-Erickson, Toronto	MJ	29,132	70.2	194,312	70.2
Cossette Communication-Marketing, Quebec City	NA	28,256	34.5	180,682	32.2
MacLaren:Lintas, Toronto	MJ	28,226	6.9	188,266	6.9
Young & Rubicam, Toronto	MJ	24,671	4.2	164,567	4.2
Ogilvy & Mather, Toronto	MJ	22,974	71.7	158,445	77.6
McKim Advertising, Toronto	NA	22,648	2.7	151,071	2.6
J. Walter Thompson Co., Toronto	MJ	21,896	3.6	162,526	15.3
Grey Canada, Toronto	MJ	17,957	10.0	119,776	10.0
Baker Lovick, Toronto	MN	17,745	8.7	118,359	8.7
FCB/Ronalds Reynolds, Toronto	MJ	17,134	67.1	114,287	67.1
Leo Burnett Co., Toronto	MJ	13,291	9.1	88,613	9.1
Backer Spielvogel Bates Canada, Toronto	MJ	13,008	21.0	104,214	8.6
Saatchi & Saatchi Compton Hayhurst, Toronto	MJ	12,884	13.9	107,369	18.4
BCP Group, Montreal	NA	12,708	(24.6)	84,721	(24.6)
Scali, McCabe, Sloves-Canada, Toronto	MJ	10,226	12.6	49,769	11.7
DMB&B, Toronto	MJ	9,787	14.7	74,888	8.3
Carder Gray DDB Needham, Toronto	MJ	8,847	NA	59,009	NA
Groupe Morrow, Montreal	NA	6,543	41.2	43,619	41.2
Promanad Communication, Toronto	NA	6,165	33.1	41,102	33.1
Chiat/Day/Mojo, Toronto	MJ	5,154	122.9	35,000	75.0
MMBD Alliance, Toronto	MN	4,844	NA	32,295	NA
McLauchlan, Mohr, Massey, Toronto	NA	4,718	13.6	31,456	13.6
Ambrose Carr Linton Kelly, Toronto	NA	4,697	17.1	31,036	16.2
Kert Advertising, Toronto	NA	3,522	5.7	27,406	7.6
Lowe Canada/Deacon Day, Toronto	JV	3,513	101.3	23,422	101.3
Anderson Advertising, Toronto	NA	3,188	13.5	21,054	11.7
Ian Roberts Advertising, Toronto	NA	2,936	(8.5)	20,971	(5.6)
Enterprise Advertising, Toronto	MJ	2,813	(12.3)	18,135	(15.2)
Base Brown & Partners, Toronto	NA	2,516	25.5	14,260	27.0
Bozell Palmer Bonner, Toronto	MJ	2,004	9.6	13,370	9.6
BBDO Retail Canada, Toronto	MJ	1,777	29.5	11,853	29.5
Allard/SMW & Associes, Montreal	NA	1,699	16.6	11,324	16.6
Paul, Phelan & Perry, Toronto	NA	1,510	NA	10,066	NA
Comcore Direct, Toronto	MJ	975	63.7	6,502	63.7
Publicite Pinnacle, Montreal	NA	218	35.9	1,468	40.7

■ **Notes:** Baker Lovick, minority owned by BBDO Worldwide, includes gross income and billings figures for Grand Tandy, which merged with Baker Lovick June '89. McCann-Erickson Canada includes Harrod & Mirlin, Foster/McCann and Marketel Canada; McLauchlan, Mohr, Massey, Lowe Canada/Deacon Day and Allard/SMW & Associes, gross income for both years AA estimate; Young & Rubicam Canada includes Wunderman and Burson-Marsteller.

Chile Exchange rates: 0.0042 0.00410 peso

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
J. Walter Thompson Chilena, Santiago	MJ	3,819	28.7	25,458	28.7
McCann-Erickson, Santiago	MJ	3,658	58.5	24,397	58.5
BBDO de Chile, Santiago	MN	3,144	53.7	18,957	52.8
A.M.W. de Publicidad, Santiago	MN	2,358	55.9	15,718	55.9
Northcote/Ogilvy & Mather, Santiago	MN	1,768	36.9	11,788	36.9
Lintas:Chile, Santiago	MJ	1,723	27.5	11,494	27.5
Leo Burnett-Chile, Santiago	MJ	1,481	109.8	9,873	109.8
Porta Publicidad, Santiago	NA	1,317	15.4	8,860	16.4
Grey Chile, Santiago	MN	1,277	24.5	8,515	24.5
Israel & De Bianchi, Santiago	NE	1,171	25.4	7,807	25.3
Publicitaria Lopez & Sutil, Santiago	NA	1,044	NA	9,043	NA
Epoca Publicidad, Santiago	NA	1,039	134.6	6,928	134.6
Hermosilla, Zegers, Santiago	MN	867	27.5	5,784	27.5
Young & Rubicam de Chile, Santiago	MJ	778	28.8	4,669	21.6
Prolam, Santiago	NA	599	53.2	3,992	53.2

Chile (continued)

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
BSB/Gubbins, Lambiasi, Santiago	NE	552	90.0	3,701	91.2
Prologo/Bozell, Santiago	NE	410	103.0	2,737	102.9

■ **Notes:** Israel & de Bianchi affiliated with Saatchi & Saatchi Advertising; Hermosilla, Zegers 16% owned by BBDO Worldwide; AMW de Publicidad 20% owned by J. Walter Thompson Co. Publicitaria Lopez y Sutil opened Oct. 1988.

China Exchange rates: 0.2686 0.27270 yuan

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
McCann-Erickson Jardine, Beijing	MJ	1,076	(8.4)	7,177	(8.4)
HDM/DYR Advertising, Beijing	MJ	313	10.4	3,490	83.7

Colombia Exchange rates: 0.00276 0.00350 peso

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Propaganda Sancho, Bogota	NE	3,831	15.0	18,039	15.2
McCann-Erickson, Bogota	MJ	2,863	14.6	19,099	14.6
Atlas Publicidad, Bogota	NE	2,379	10.4	15,862	43.9
Leo Burnett-Colombia, Bogota	MJ	2,092	4.4	13,952	4.4
Atenas/BBDO, Bogota	NE	1,717	5.7	11,450	5.7
FCB/Puma, Bogota	MJ	1,525	(5.6)	10,171	(5.6)
BSB/Meza, Bogota	NE	1,195	(29.0)	7,970	(29.0)
Centrum/Ogilvy & Mather, Bogota	NE	1,124	NA	7,753	NA
Jaime Uribe & Asociados, Medellin	NE	828	(24.9)	5,520	(24.9)
J. Sanchez Asociados, Bogota	NE	684	0.1	3,257	0.1
Lintas:Colombia, Bogota	MJ	610	132.8	4,066	132.8

■ **Notes:** Propaganda Sancho affiliated with Saatchi & Saatchi Advertising; McCann-Erickson includes Harrison; Jaime Uribe & Asociados affiliated with Lintas:Worldwide. Gross income figures for both years AA estimates, Adas Publicidad affiliated with J. Walter Thompson Co.; J. Sanchez Asociados affiliated with Bozell.

Costa Rica Exchange rates: 0.0120 0.01445 colon

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Alberto Garnier, San Jose	NE	1,728	4.2	11,528	4.2
McCann-Erickson Centroamericana, San Jose	MJ	1,209	14.3	8,066	14.3
FCB/Siboney, San Jose	MJ	512	2.0	3,415	2.0
Publicidad Commercial, San Jose	MN	203	160.7	1,352	160.7

■ **Notes:** Publicidad Comercial de Centroamericana 30% owned by Leo Burnett Co.; Alberto Garnier affiliated with BBDO Worldwide.

Curacao Exchange rates: 0.56180 0.56180 florin

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
R.J. Dovale Advertising, Willemstad	NA	311	15.2	1,139	18.5

Cyprus Exchange rates: 2.00650 2.23200 Cyprus pound

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Impact/BBDO International, Nicosia	MN	2,654	1.8	26,063	5.4
AMC Arab Market Advertising, Nicosia	NA	542	19.6	NA	NA

■ **Notes:** Impact/BBDO International includes Impact & Echo, Kuwait; Impact/BBDO, Egypt, Saudi Arabia and Dubai. Gross income figures for the group exclude the Kuwait office.

Denmark Exchange rates: 0.13718 0.14960 kroner

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Ted Bates Holding, Copenhagen	MJ	17,640	1.5	129,677	7.6
Young & Rubicam, Copenhagen	MJ	9,554	22.7	63,724	22.7
Scan-Ad Reklamebureau, Aarhus	NA	8,464	(2.3)	56,455	(2.3)
Grey Communications Group, Copenhagen	MJ	7,663	47.0	51,113	47.0
Lintas/GR:Denmark, Copenhagen	MJ	7,613	61.7	50,781	61.7
Thomas Bergsoe, Klampenborg	NA	6,969	11.4	45,544	12.3
Henriksen & Sieling/BBDO, Copenhagen	MJ	5,186	5.9	34,591	5.9
Norgard Mikkelsen Reklamebureau, Odense	MJ	4,876	2.6	40,904	43.3
Lyre & Valbo, Copenhagen	NA	4,248	(16.8)	28,317	(16.9)
NP/3 Reklamebureau, Aarhus	NA	4,122	(1.0)	27,495	(1.0)
Ogilvy & Mather, Copenhagen	MJ	4,057	(15.8)	27,977	(7.4)
HDM Group, Copenhagen	MJ	3,719	231.4	24,804	231.5
Leo Burnett-Denmark, Copenhagen	MJ	2,871	(1.3)	19,144	(1.3)
Createam, Frederiksberg	NE	2,401	10.7	16,462	13.4
Nielsen, Mikkelsen & Duus, Copenhagen	MJ	2,394	68.7	15,968	68.7
McCann-Erickson, Copenhagen	MJ	2,332	(20.5)	15,558	(20.5)
Dyppel Advertising, Copenhagen	NA	1,976	(3.7)	6,930	(3.7)
Berg & Lyhne Reklame, Copenhagen	NA	1,964	0.4	6,996	10.6
DMB&B, Copenhagen	MJ	1,940	8.7	17,098	12.0
Ipsen & Parmo, Copenhagen	MJ	1,547	12.6	12,104	14.5
Saatchi & Saatchi Advertising, Copenhagen	MJ	1,525	173.3	8,607	159.3
FCB/Hiort, Stenius & Walter, Copenhagen	MJ	1,393	(35.8)	9,294	(35.8)
Zangenberg & Lembourn/EWDB, Copenhagen	MJ	1,362	NA	4,205	NA
J. Walter Thompson Co., Copenhagen	MJ	1,171	1.9	8,526	11.2
BBDO Business Communications, Copenhagen	MJ	948	(5.8)	6,323	(5.8)
Obro, Gronholm & Bydal, Copenhagen	MJ	647	2.1	4,315	2.1
Sorensen, Selig & Guldmann, Copenhagen	MJ	607	(40.8)	4,051	(40.8)

■ **Notes:** Ipsen & Parmo 51% owned by DMB&B; HDM Group includes figures for Pro Reklame; Scan-Ad includes offices in Odense, Soenderborg, Haderslev, Ringkoebing, Grafisk Reklame, Grafisk Team and Moeller og Bjoernstrup Marketing; Norgard Mikkelsen 60% owned by Backer Spielvogel Bates; Createam affiliated with Bozell; Lintas GR includes figures for Gutenberghus for 1989; Henriksen & Sieling/BBDO, Nielsen, Mikkelsen & Duus, Obro, Gronholm & Bydal, Sorensen, Selig & Guldmann and BBDO Business Communications together form Team/BBDO Group Denmark.

Dominican Republic Exchange rates: 0.14909 0.19980 peso

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Young & Rubicam Damaris, Santo Domingo	MJ	1,228	(33.7)	8,191	(33.7)
McCann-Erickson Dominicana, Santo Domingo	MJ	882	31.8	5,882	31.8
Leo Burnett Co., Santo Domingo	MJ	602	46.9	4,015	47.0
FCB/Siboney, Santo Domingo	MJ	534	12.2	3,565	12.2
Cumbre/Saatchi & Saatchi, Santo Domingo	NE	354	21.8	1,769	34.1

Dubai Exchange rates: 0.2724 0.27050 dirham

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Madco Gulf (Dubai), Dubai	NA	2,100	31.3	6,100	19.6

Ecuador Exchange rates: 0.0019 0.00277 sucre

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Veritas/Ogilvy & Mather, Guayaquil/Quito	NE	1,447	46.4	9,981	51.4
Norlop-Thompson Asociados, Guayaquil	MN	1,434	40.2	9,564	40.2
McCann-Erickson, Guayaquil	MJ	1,144	20.2	7,628	20.2
Publicitas, Guayaquil	NE	460	33.0	3,066	33.0
Andina/BBDO, Guayaquil	NE	336	(13.2)	2,239	(13.2)
FCB/Artefilme, Guayaquil	MJ	324	0.6	2,162	0.6
VIP Publicidad, Quito	NE	203	21.9	1,351	21.9

■ **Notes:** Publicitas affiliated with Saatchi & Saatchi Advertising, VIP Publicidad affiliated with Backer Spielvogel Bates. Gross income figures AA estimates.

Egypt Exchange rates: 0.40539 0.44300 Egyptian pound

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
AMA Leo Burnett, Cairo	NE	224	64.3	1,495	64.3

El Salvador Exchange rates: 0.20000 0.18890 colon

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
McCann-Erickson Centroamericana, San Salvador	MJ	691	26.1	4,612	26.1

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
El Salvador (continued)					
Apex Publicidad, San Salvador	NE	443	17.0	2,955	17.0
■ **Notes:** Apex Publicidad affiliated with BBDO Worldwide. Gross income figures AA estimates.					
Finland	Exchange rates: 0.23322 0.23900 markka				
McCann-Erickson Finland, Helsinki	MJ	13,731	20.0	91,585	20.0
BSB Finnad Advertising, Helsinki	MJ	12,664	20.1	84,469	20.1
Sek & Grey Oy, Helsinki	MN	10,607	5.7	70,747	5.7
Markkinointi Viherjuuri, Helsinki	NA	8,163	4.4	29,537	12.9
Lintas:Helsinki, Helsinki	MJ	7,154	7.7	47,718	7.7
Mainosyhtyma Oy, Helsinki	NA	6,577	1.2	31,251	(3.9)
Erva-Latvala Oy, Helsinki	NA	6,098	8.4	33,175	(11.6)
Turkama & Co., Helsinki	NA	5,329	5.4	35,542	5.4
Oy Taucher Y&R, Helsinki	MN	4,997	(1.9)	33,330	(1.9)
AKT/BBDO Business, Helsinki	MN	4,784	45.6	13,674	63.3
Oy Adsek, Tampere	NA	3,771	17.0	NA	NA
Mainostoimisto MAS Oy, Helsinki	NA	3,706	(31.9)	24,718	(26.3)
Alliance Oy, Helsinki	MN	3,615	26.0	24,022	25.6
MK-mainos Oy, Helsinki	NA	3,565	15.8	NA	NA
Anderson & Lembke Oy, Helsinki	NA	3,398	(3.4)	NA	NA
Tehomainos-J. Walter Thompson Oy, Helsinki	NE	3,345	10.2	22,310	10.2
Kauppamainos Oy, Helsinki	NE	3,312	11.7	22,089	11.8
Markkinointi Topitorma Oy, Helsinki	NA	3,288	10.9	21,741	6.3
Mainostoimisto Konsepti Oy, Helsinki	NA	3,148	0.6	NA	NA
Juniormainos Oy, Helsinki	NA	3,132	(14.4)	20,890	(14.4)
Oy Interplan, Helsinki	NE	3,032	7.5	20,223	7.5
Ogilvy & Mather Oy, Helsinki	MJ	2,530	(18.0)	17,451	(25.8)
Varis Poteri Veistola Oy, Helsinki	NA	2,464	14.6	10,007	39.6
HDM Exit Oy, Helsinki	MN	2,402	(0.5)	16,020	(2.8)
Datum Oy, Helsinki	NA	2,332	(2.4)	59,005	1.6
Turun Taucher Oy, Turku	NA	2,287	11.6	NA	NA
Oy Valotorni, Helsinki	NA	2,265	(1.7)	15,110	(1.7)
Mainoskentta Oy, Tampere	NA	2,258	15.2	14,500	10.5
Lintas:Make Direct Oy, Helsinki	MJ	2,146	30.7	14,314	30.7
Creator Oy, Helsinki	NA	2,006	(2.3)	6,227	3.1
DMB&B, Helsinki	MJ	1,985	15.3	13,236	15.3
Mainostoimisto U&M Oy, Helsinki	NA	1,982	7.7	NA	NA
Oy ILMO, Helsinki	NA	1,959	(41.0)	NA	NA
Markkinointiryhma Oy, Helsinki	NA	1,842	(17.9)	NA	NA
Tampereen Taucher Oy, Tampere	NA	1,649	6.9	3,468	10.1
USP Turku Oy, Turku	NA	1,411	9.3	9,411	9.3
Oy Avant/BBDO, Helsinki	MN	1,392	37.4	2,381	25.0
Mainos Lehmus Oy, Tampere	NA	1,353	6.8	4,618	4.4
Oy Preesens, Vantaa	NA	1,329	24.3	NA	NA
Markkinamainos Oy, Helsinki	NA	1,223	(1.2)	NA	NA
Lahden Taucher, Lahti	NA	1,034	32.9	3,880	10.2
Mainosforum Oy, Helsinki	NA	854	(17.1)	5,695	(17.1)
Mainostoimisto Total Oy, Helsinki	NA	678	25.4	NA	NA
J&C Advertising Oy, Helsinki	NE	630	1.3	2,099	(24.3)
HPV Oy, Helsinki	NA	630	1.3	NA	NA
■ **Notes:** McCann-Erickson Finland includes Oy Liikemainonta-McCann and Womena; J&C Advertising affiliated with N W Ayer; Oy Interplan affiliated with Saatchi & Saatchi Advertising; Young & Rubicam includes Wunderman; AKT/BBDO Business 40% owned by BBDO Worldwide; Tehomainos-JWT Oy 25% owned by J. Walter Thompson Co.; Sek & Grey Oy 22.5% owned by Grey Advertising; Oy Avant/BBDO 20% owned by BBDO Worldwide; Kauppamainos Oy non-equity affiliation with Bozell.					
France	Exchange rates: 0.15675 0.16910 franc				
Publicis Conseil, Paris	MJ	131,200	4.8	874,822	4.8
HDM France, Paris	MJ	109,208	19.5	728,416	19.5
RSCG France, Issy-les-Moulineaux	MJ	107,000	0.4	705,375	(0.7)
BDDP, Paris	MJ	79,159	14.2	527,934	14.2
Young & Rubicam France, Paris	MJ	56,077	9.7	374,031	14.8
Lintas:Paris, Paris	MJ	42,582	6.1	284,022	6.1
DDB Needham, Paris	MJ	37,455	23.3	249,822	47.7
Ogilvy & Mather France, Paris	MJ	34,718	49.9	253,299	63.9
Saatchi & Saatchi Advertising, Paris	MJ	33,651	9.2	224,450	9.2
McCann-Erickson France, Paris	MJ	32,009	69.2	213,498	69.2
Belier France/EWDB, Paris	MJ	29,312	6.7	195,467	6.8
Synergie EWDB, Paris	JV	26,648	5.1	188,100	1.1
CLM/BBDO, Paris	MJ	26,648	85.0	177,755	85.0
ECOM/EWDB, Neuilly	MJ	24,641	28.2	164,356	28.2
Grey, Paris	MJ	21,567	19.9	143,850	19.9
FCA!, Suresnes	MJ	21,224	(0.2)	141,545	(0.2)
CFP Alliance, Paris	MN	21,161	4.3	141,075	3.6
TBWA, Paris	MJ	19,568	28.6	130,518	28.6
Foote, Cone & Belding, Neuilly	MJ	19,218	0.7	128,174	0.7
MGTB Ayer, Paris	MN	18,653	1.2	120,098	0.5
DMB&B, Paris	MJ	15,188	74.3	107,229	65.4
Equateur/EWDB, Paris	MJ	14,108	3.0	94,050	3.0
BSB France, Paris	MJ	13,400	9.3	89,300	13.4
Robert & Partners/EWDB, Paris	MJ	13,167	3.8	87,780	3.8
Alice/CDP, Paris	JV	12,000	NA	80,000	NA
Bordelais, Lemeunier/Leo Burnett, Paris	MJ	11,128	(4.8)	74,191	(4.8)
J. Walter Thompson Co., Paris	MJ	10,746	10.3	71,675	10.3
The Creative Business, Issy-les-Moulineaux	MJ	10,000	(16.7)	62,700	(21.6)
BCRC, Paris	NA	8,621	13.3	57,998	14.3
M.A.O./EWDB, Paris	MJ	8,182	5.2	54,576	5.2
Eldorado/EWDB, Paris	MJ	7,687	0.8	50,042	1.3
Australie/EWDB, Levallois-Perret	MJ	5,486	13.8	17,243	10.8
Audour, Soum, Larue/SMS, Paris	MJ	4,822	119.2	32,146	119.1
Faure Vadon Forest Bridoux, Paris	MJ	4,703	NA	31,084	NA
RSCG Export, Issy-les-Moulineaux	MJ	4,420	47.3	22,102	8.9
Lowe Quadrillage, Boulogne	MN	3,182	(19.5)	21,216	(19.5)
GGK Paris, Levallois-Perret	MJ	2,736	(13.7)	18,251	(13.7)
Ateliers ABC, Paris	MJ	2,508	NA	16,816	NA
Collette, Paris	MJ	2,351	NA	15,688	NA
Agence Amazonie, Paris	NA	2,351	15.9	9,405	32.4
France (continued)					
Black Pencil, Paris	MJ	2,075	56.2	13,831	56.2
CPV, Paris	MJ	1,959	NA	13,076	NA
Conquest Europe, Paris	MJ	1,736	15.4	11,810	17.4
Meunie Granier Deferre, Paris	MJ	1,729	NA	11,830	NA
Promo 2000, Paris	MJ	1,568	NA	10,389	NA
154-Testa, Paris	MN	1,411	NA	7,838	NA
Edifrance, Paris	MJ	1,332	NA	8,817	NA
Domino Ketchum, Paris	MN	1,070	NA	7,200	NA
Publicite Claude Michel, Paris	NA	760	(5.1)	3,159	(1.2)
HVA Conseil, Montauban	NA	658	(23.7)	1,505	(19.1)
Monhard Flimon, Paris	MJ	537	NA	3,099	NA
Landrin et Associes, Paris	MJ	314	NA	2,061	NA
■ **Notes:** Publicis Conseil includes BCA Publicis, Edico Publicis, Grand Angle Publicis, Publicis Mediterranee, Projectis, Publicis Soleil, Publicis Qualigraphie, Intermarco, Loeb & Associes, Orexa, Siquier Courcelle & Associes, Success Stad, Publicis Sante.Young & Rubicam includes Wunderman, Cato-Johnson, Sudler & Hennessey, Burson-Marsteller; RSCG France includes 24 French regional agencies, plus RSCG Best Seller, RSCG Communicance, RSCG Sante and RSCG Corp.; RSCG Export covers agencies in Africa, the Middle East and the Caribbean; The Creative Business 51% owned by RSCG; Agence Amazonie, part of the Crossworld group; McCann-Erickson France includes Joannis Schneider, Universal Media, France SP-3, Grenoble, Internal, Fab, Lyon, Creation, Lauro, Paris and AMP France; FCB includes Effi FCB, Media Synthese, Empir Media, Empir (Nucleus), Axe (Declic) and Manual Nono; Synergie EWDB was named Synergie Polaris BJKE France until the end of 1989; Black Pencil/Paris majority owned by Leo Burnett Co.; Ateliers ABC, Promo 2000, Collette, Edifrance, Landrin et Associes, Monhard Flimon, Faure Vadon Forest Bridoux, CPV and Meunie Granier Deferre, all majority-owned by RSCG; Alice/CDP, joint venture with Collett Dickenson Pearce, London.					
Greece	Exchange rates: 0.00626 0.00712 drachma				
Spot/Thompson Advertising, Athens	MN	5,668	23.2	37,810	23.2
Adel/Saatchi & Saatchi, Athens	JV	4,691	54.7	26,635	54.1
Bold Advertising, Athens	NE	3,789	(5.0)	26,524	(5.0)
Lintas:Athens, Athens	MJ	3,572	19.1	23,827	19.1
Olympic DDB Needham, Athens	MJ	3,385	36.6	22,576	36.6
Leo Burnett Co., Athens	MJ	2,982	13.4	19,882	13.4
BBDO/Athens, Athens	MJ	2,531	18.5	16,884	18.5
McCann-Erickson Hellas, Athens	MJ	2,279	15.5	15,202	15.5
Leoussis Advertising, Athens	NA	2,004	34.0	13,152	31.9
Gnomi/FCB, Athens	MN	1,978	0.9	12,443	(5.3)
Alector Advertising, Athens	NA	1,691	25.0	10,647	24.2
BSB Athens Advertising, Athens	MJ	1,666	32.7	11,105	40.0
Geo/Young & Rubicam, Athens	MN	1,468	98.3	8,455	44.8
DMB&B Ergon, Athens	MJ	867	17.3	5,511	22.9
Target Advertising, Athens	MN	770	223.0	5,134	223.0
Magnet Advertising, Athens	NE	689	NA	4,040	NA
Echo Advertising, Athens	NA	639	1.3	4,541	5.1
RSCG Palavidis, Athens	MJ	532	99.4	3,319	86.5
Epsilon-Epsilon, Athens	NA	431	28.0	2,818	11.5
Comark, Athens	MN	424	(46.4)	1,904	(51.0)
Conquest Europe, Athens	MJ	314	NA	2,112	NA
Sigma Ltd., Athens	NA	254	(5.6)	1,692	(5.6)
Grant Hellas, Athens	MN	203	30.7	1,491	49.5
■ **Notes:** Bold Advertising affiliated with Ogilvy & Mather; Magnet Advertising affiliated with Saatchi & Saatchi Advertising; Comark minority-owned by Bozell, is the coordinating office for Bozell Middle East; Grant Hellas minority-owned by Bozell; Target Advertising minority-owned by HDM.					
Guatemala	Exchange rates: 0.35792 0.39670 quetzal				
Publicidad McCann-Erickson, Guatemala City	MJ	1,392	13.5	9,287	13.5
Communica Publicidad S.A., Guatemala City	NE	1,008	37.4	6,717	37.4
Avance/BBDO Publicidad, Guatemala City	MN	724	63.1	4,824	63.1
FCB Publicidad, Guatemala City	MJ	693	(2.7)	4,619	(2.7)
Publimerca, Guatemala City	NE	238	29.6	1,595	42.7
■ **Notes:** Publimerca affiliated with N W Ayer; Communica Publicidad affiliated with Leo Burnett Co. APCU Thompson, 40% owned by J. Walter Thompson Co., with offices in Panama, Costa Rica, El Salvador and Honduras, did not submit figures.					
Honduras	Exchange rates: 0.50000 0.36350 lempira				
McCann-Erickson Centroamericana, Tegucigalpa	MJ	898	48.5	5,985	48.4
Zeus Publicidad, Tegucigalpa	MN	706	83.4	3,104	60.8
FCB/Artefilmo, Tegucigalpa	MJ	328	124.8	2,189	124.8
■ **Notes:** Zeus Publicidad 20% owned by BBDO Worldwide.					
Hong Kong	Exchange rates: 0.12820 0.12820 Hong Kong dollar				
Ogilvy & Mather, Hong Kong	MJ	12,402	15.3	85,534	58.4
Leo Burnett Ltd., Hong Kong	MJ	8,706	28.0	58,045	28.0
J. Walter Thompson Co., Hong Kong	MJ	7,340	13.8	48,931	13.8
HDM Hong Kong, Hong Kong	MJ	6,859	20.4	45,750	20.2
Backer Spielvogel Bates, Hong Kong	MJ	6,511	47.8	43,407	48.5
Ball Partnership, Hong Kong	MJ	6,022	23.9	40,165	23.9
BBDO Hong Kong, Hong Kong	MJ	4,631	41.7	30,888	41.7
DDB Needham, Hong Kong	MJ	4,292	24.0	28,628	30.0
McCann-Erickson, Hong Kong	MJ	4,249	24.2	28,338	24.2
People & Grey, Hong Kong	MJ	3,673	31.7	24,498	31.7
Bozell, Hong Kong	MJ	3,530	40.5	23,535	40.5
Saatchi & Saatchi Advertising, Hong Kong	MJ	2,931	24.0	19,539	43.8
Lintas: Hong Kong, Hong Kong	MJ	2,485	13.6	16,576	13.6
DMB&B Modern, Hong Kong	MJ	2,165	10.9	14,577	12.1
Foote, Cone & Belding, Hong Kong	MJ	1,515	(0.9)	10,102	(0.9)
Lee Davis Ayer, Hong Kong	MJ	1,366	22.7	9,110	22.7
Campaign Advertising, Hong Kong	NA	1,282	56.3	6,410	56.3
PMP Advertising, Hong Kong	NA	1,038	38.5	6,923	38.5
Far East-Ketchum Advertising, Hong Kong	MN	986	23.5	5,842	9.7
■ **Notes:** PMP Advertising gross income for both years AA estimate.					
Hungary	Exchange rates: 0.01290 0.00000 forint				
Young & Rubicam Hungary, Budapest	ND	865	NA	5,770	NA
McCann-Erickson Hungary, Budapest	MJ	196	NA	1,305	NA
Ogilvy & Mather, Budapest	MJ	5	NA	33	NA
India	Exchange rates: 0.06288 0.07360 rupee				
Hindustan Thompson Associates, Bombay	NE	9,543	21.7	63,622	21.7
Lintas:India, Bombay	MN	8,000	(5.9)	53,363	(5.9)
Ogilvy Benson & Mather, Bombay	MN	5,174	13.6	35,686	17.4
Mudra Communications, Ahmedabad	NE	5,087	22.3	19,971	(44.3)
Ulka Advertising, Bombay	NA	3,622	2.5	24,146	2.5
Everest Advertising, Bombay	NE	3,572	19.2	22,046	10.3

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
India (continued)					
R.K. Swamy/BBDO Advertising, Madras	NE	3,018	1.3	20,122	1.3
Advertising & Sales Promotion, New Delhi	NE	1,985	(6.0)	11,344	(6.0)
Jaisons Intl. Associates, Bombay	NA	1,889	0.5	10,703	0.5
Chaitra Advertising, Bombay	NA	1,855	2.0	12,362	2.1
daCunha Associates, Bombay	NA	1,700	(6.1)	10,990	(5.7)
MAA Communications, Bangalore	NA	1,654	104.3	11,004	6.8
Trikaya Grey, Bombay	ND	1,554	20.8	10,368	20.8
Sista's Private, Bombay	NE	1,270	(18.6)	8,460	(19.1)
Contour Advertising, Bombay	NA	762	23.3	4,770	23.5
McCann-Erickson Tara Sinha, New Delhi	NE	534	NA	3,562	NA
Raka Advertising, Bombay	NA	309	13.7	1,945	8.2
Arms Communications, New Delhi	NE	308	4.7	2,201	2.1

■ **Notes:** Mudra Communications affiliated with DDB Needham Worldwide; Everest Advertising minority owned by Saatchi & Saatchi Advertising; Sista's Private affiliated with Backer Spielvogel Bates; Advertising & Sales Promotion affiliated with N W Ayer; Hindustan Thompson Associates non equity affiliation with J. Walter Thompson Co.; Arms Communications affiliated with Bozell; Rediffusion Advertising, affiliated with HDM, did not submit figures.

Indonesia		Exchange rates: 0.00057 0.00059 rupiah			
P.T. Citra:Lintas, Jakarta	NE	3,544	39.0	23,639	39.0
Matari Inc., Jakarta	NE	3,438	90.4	19,482	93.0
P.T. Indo Ad, Jakarta	NE	1,918	35.4	13,227	43.7
Cipta, Jakarta	NE	1,779	NA	11,924	NA
Adforce-J. Walter Thompson Co., Jakarta	NE	1,588	42.8	10,482	41.3
PT Bates Mulia Indonesia, Jakarta	NE	1,157	50.1	7,034	32.0
PT. Rama Perwira, Jakarta	NA	743	2.2	4,641	2.2
P.T.Forum Cahayabuana, Jakarta	MJ	504	NA	3,359	NA
Perwanal DMB&B, Jakarta	MN	396	16.2	2,595	22.8

■ **Notes:** Cipta affiliated with Saatchi & Saatchi Advertising; PT. Rama Perwira gross income for both years AA estimates; Matari Inc affiliated with Bozell; P.T. Forum Cahayabuana majority-owned by Foote, Cone & Belding.

Ireland		Exchange rates: 1.41874 1.53180 pound			
Wilson Hartnell Group, Dublin	MJ	6,445	87.3	44,448	108.9
McConnells Advertising, Dublin	NA	4,370	2.0	29,134	2.0
Saatchi & Saatchi Advertising, Dublin	MJ	4,326	8.0	27,031	33.6
Arks Alliance, Dublin	MJ	3,062	48.2	20,416	48.1
Hunter Advertising, Dublin	MJ	2,410	(4.2)	16,067	36.4
Doherty Advertising, Dublin	NA	2,128	15.8	10,641	15.8
Young Alliance, Dublin	MJ	1,632	(18.1)	10,882	(18.1)
O'Keeffes Ltd., Dublin	NA	1,297	(7.5)	8,661	(5.3)
DMB&B, Dublin	MJ	104	(74.7)	768	(71.9)

■ **Notes:** Hunter Advertising part of Backer Spielvogel Bates; McConnells Advertising gross income figures for both years AA estimates.

Israel		Exchange rates: 0.5477 0.62750 shekel			
Ariely Communications, Tel Aviv	NA	5,537	47.1	27,551	37.2
Gitam Image, Ramat-Gan	NA	3,250	(5.8)	23,000	NA
Fogel Levin, Tel Aviv	NA	1,972	NA	13,146	NA
Pelled Advertising, Tel Aviv	NA	1,700	12.0	10,500	29.0
Bing Linial Advertising, Tel Aviv	NA	1,479	2.5	7,395	2.5

■ **Notes:** Fogel Levin 1989 gross income AA estimate.

Italy		Exchange rates: 0.00073 0.00077 lira			
Publicis.FCB/Mac, Milan	MJ	54,550	15.1	363,851	7.5
Gruppo Armando Testa, Turin/Milan/Rome	MJ	50,232	5.2	349,440	8.1
Young & Rubicam Italia, Milan	MJ	46,980	23.4	383,431	50.9
McCann-Erickson Italiana, Milan	MJ	38,090	3.4	254,064	3.4
J. Walter Thompson Italia, Milan	MJ	28,756	4.6	257,348	14.2
Italia/BBDO, Milan	MN	27,664	8.9	184,184	8.7
EWDB Italia, Milan	MJ	24,424	(2.1)	186,368	12.1
Saatchi & Saatchi Advertising, Rome	MJ	24,170	6.8	221,312	17.3
DMB&B, Milan/Rome	MJ	21,130	7.9	136,699	7.4
Milano & Grey, Milan	MJ	20,206	16.9	148,307	28.6
TBWA Italia, Milan	MJ	18,743	19.5	127,400	0.3
Lintas:Milano, Milan	MJ	18,653	(13.3)	124,414	(13.3)
Canard Advertising, Turin	MJ	17,951	37.1	149,589	38.8
Pirella Goettsche Lowe, Milan	MJ	17,701	12.7	118,006	12.7
Livraghi, Ogilvy & Mather, Milan	MN	16,321	(2.1)	133,760	(0.5)
Leo Burnett Co., Milan	MJ	11,247	9.5	74,984	9.5
BSB Italia, Milan	MJ	9,663	29.6	73,590	8.8
HDM WE, Milan	MJ	9,299	22.6	62,022	22.6
RSCG Mezzano Costantini Mignani, Milan	MJ	8,182	1.2	96,932	0.7
Bozell e Associati, Milan	MJ	7,717	(3.6)	64,428	(3.5)
DDB Needham Italy, Milan	MJ	7,312	36.5	48,771	36.5
Publinter Ayer, Milan	MJ	7,003	(18.5)	66,650	(17.6)
Longari & Loman/BDDP, Milan/Bologna	MJ	6,552	NA	43,636	NA
B Communications Group, Milan	NA	6,398	(1.8)	59,426	2.1
FCA/Sabbatini Baldoni Panzeri, Milan	MJ	6,331	56.7	42,224	56.7
Pubblimarket/Idea2 Alliance, Milan/Udine	MN	5,591	123.7	41,860	151.1
AssociatiGlobe, Milan	MN	3,385	4.7	22,568	4.7
GGK Milan, Milan	MJ	3,349	(19.4)	22,336	(19.4)
Conquest Europe, Milan	MJ	2,944	25.0	33,372	39.6
Adver Pubblicita e Marketing, Padua	NA	1,092	18.2	8,736	12.1
Wirz Italia, Milan	MN	803	(0.7)	5,356	(0.7)

■ **Notes:** Young & Rubicam includes Wunderman, Cato Johnson, Sudler & Hennessey, Burson-Marsteller; Publicis FCB/MAC includes Euro Advertising Group, Park-Concept, IPR/Comunicazione Strategica, Art Design, Optimedia, The Promotion Centre, Publicis Communication; Gruppo Armando Testa includes L'Altra, Media Italia Group, Telecontatto, Creativity, In Testa, Ardo Film, Pubblidata/Delphos; Pirella Goettsche Lowe gross income for both years AA estimates; McCann-Erickson Italiana includes Italy and Italy MPI; Longari & Loman/BDDP association with L&L took place in '89, figures are not comparable; B Communications gross income for both years AA estimates; Canard Advertising 60% owned by London-based Collett Dickenson Pearce.

Ivory Coast		Exchange rates: 0.00319 0.00378 Central African franc			
Lintas:Abidjan, Abidjan	MJ	1,549	2.6	10,334	2.6

Jamaica		Exchange rates: 0.1818 0.17560 Jamaican dollar			
McCann-Erickson, Kingston	MJ	1,271	37.8	8,476	37.8
CGR Communications, Kingston	NE	977	117.2	6,520	117.3
Lindo FCB Communications, Kingston	MN	644	21.9	4,295	21.9

■ **Notes:** CGR Communication affiliated with Saatchi & Saatchi Advertising.

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Japan		Exchange rates: 0.00745 0.00769 yen			
Dentsu Inc., Tokyo	NA	1,314,400	11.9	10,063,184	12.6
Hakuhodo Inc., Tokyo	NA	585,457	12.1	4,449,166	12.9
Tokyu Agency, Tokyo	NA	156,222	16.0	1,259,398	12.9
Dai-Ichi Kikaku, Tokyo	NA	155,795	9.8	1,052,953	7.7
Daiko Advertising, Osaka	NA	152,064	8.9	1,214,107	7.8
Asatsu, Tokyo	NA	113,879	10.8	837,272	13.1
Yomiko Advertising, Tokyo	NA	100,302	11.5	753,480	14.1
I&S Corp., Tokyo	NA	94,734	13.9	770,203	11.2
McCann-Erickson Hakuhodo Japan, Tokyo	MJ	92,712	5.9	618,389	5.9
Asahi Advertising, Tokyo	NA	82,888	17.3	509,429	15.7
Nihon Keizaisha Advertising, Tokyo	NA	56,278	19.6	337,268	19.2
Chuo Senko Advertising, Tokyo	MJ	50,615	7.6	376,396	8.9
Sogei Co., Tokyo	NA	49,239	25.7	300,235	14.2
Orikomi Advertising, Tokyo	NA	47,504	16.3	435,821	3.8
Man-Nen-Sha Inc., Osaka	NA	42,150	15.9	550,376	11.7
HDM KK Japan, Tokyo	MJ	38,444	15.8	291,453	16.1
Nihon Keizai, Tokyo	NA	37,198	25.6	254,812	20.5
Kyodo Advertising, Tokyo	NA	35,319	(0.1)	265,557	(1.6)
Tokyu Agency International, Tokyo	MN	34,866	15.0	272,424	16.7
Meitsu Inc., Tokyo	NA	31,961	3.2	213,070	10.1
J. Walter Thompson Japan, Tokyo	MJ	30,650	11.4	204,333	11.4
Sanko-Sha, Nagoya	NA	28,875	9.5	190,603	9.5
Leo Burnett-Kyodo Co., Tokyo	MJ	21,445	45.0	142,973	45.0
Nambokusha, Tokyo	NA	20,838	37.0	165,181	41.0
Osaka Yomiuri Advertising, Osaka	NA	18,469	14.0	142,070	14.0
Standard Advertising, Tokyo	NA	18,104	2.2	146,020	5.5
Grey-Daiko, Tokyo	JV	11,793	(6.3)	78,662	(6.3)
AD Dentsu, Tokyo	MJ	11,699	9.6	87,140	10.6
Hakuhodo:Lintas, Tokyo	JV	10,731	2.0	71,578	2.1
Toei Advertising, Tokyo	NA	7,145	13.0	54,541	5.7
Cove-Ito Advertising, Tokyo	NA	6,705	15.2	22,350	15.2
Saatchi & Saatchi Advertising, Tokyo	MJ	5,873	9.8	48,332	35.6
Medicus Intercon, Tokyo	MJ	5,544	4.6	24,142	3.0
BSB Japan, Tokyo	MN	4,222	(8.9)	37,953	(13.9)
Ketchum/Japan, Tokyo	MJ	3,846	14.8	25,653	14.8
Bozell Meitsu, Tokyo	MN	3,622	57.7	18,576	50.8
HDM DSH K.K., Tokyo	MJ	3,316	19.2	17,670	12.9
DDB Needham Japan, Tokyo	MN	1,397	NA	9,321	NA
Daiko/FCB Impact, Tokyo	JV	846	16.6	5,640	16.6

■ **Notes:** I&S Corp. fiscal year April to March; Chuo Senko Advertising includes figures for its Thailand (49% equity), Singapore (66%) and Hong Kong (100%) offices, the Malaysian office closed in '89; Dai-Ichi Kikaku 1988 figures do not reflect equity holdings; Tokyu Agency International DMB&B holds 24% equity; Medicus Intercon part of DMB&B; Hakuhodo:Lintas a 50/50 joint venture; McCann-Erickson Hakuhodo Japan is 49% owned by Hakuhodo Inc. and includes Cato Design and KK McIntyre; AD Dentsu part of Dentsu Inc.; Daiko/FCB Impact a 50/50 joint venture; Nambokusha Inc. 51% owned by Toyota Motor Corp.

Kenya		Exchange rates: 0.04525 0.05320 shilling			
McCann-Erickson Kenya, Nairobi	MJ	913	(4.7)	6,090	(4.7)
Ogilvy & Mather, Nairobi	MJ	673	(15.3)	2,836	(16.0)
Marketing Communications, Nairobi	NE	272	4.2	1,584	6.3

■ **Notes:** Marketing Communications affiliated with Saatchi & Saatchi Advertising.

Kuwait		Exchange rates: 3.37335 3.58020 dinar			
Madco Kuwait, Al Kuwait	NA	365	7.4	2,900	26.1
Hiba, Al Kuwait	MN	227	3.1	1,785	24.8

■ **Notes:** Hiba 30% owned by Bozell.

Lebanon		Exchange rates: 0.01834 0.00253 Lebanese pound			
H&C Leo Burnett, Beirut	NE	4,988	295.2	33,255	295.2
Madco Beirut, Beirut	NA	93	32.1	700	55.6
Enterprise Middle East, Athens/Beirut	MJ	7	678.7	48	678.7
Intermarkets, Beirut	NE	NA	NA	NA	NA

■ **Notes:** Intermarkets, non equity affiliation with Saatchi & Saatchi Advertising, is headquartered in London but does business in Lebanon, Saudi Arabia, Bahrain, Egypt, Kuwait, Dubai and Jordan. Enterprise Middle East majority-owned by Leo Burnett Co. and headquartered in Athens, does business in the Middle East.

Malawi		Exchange rates: 0.35486 0.47100 kwacha			
Graphic:Lintas Malawi, Blantyre	MN	287	3.3	1,914	3.3

Malaysia		Exchange rates: 0.37085 0.38350 Malaysian dollar			
Ogilvy & Mather, Petaling Jaya	MN	3,846	19.2	26,522	23.3
McCann-Erickson Malaysia, Kuala Lumpur	MJ	3,301	58.5	22,017	58.6
Leo Burnett Co., Kuala Lumpur	MN	2,730	5.2	18,200	5.2
BSB (Malaysia), Kuala Lumpur	MN	2,719	41.7	18,127	39.0
PTM Thompson Advertising, Kuala Lumpur	MN	2,370	5.9	15,947	6.9
HDM, Kuala Lumpur	MJ	2,225	34.9	14,834	33.4
Lintas:Malaysia, Kuala Lumpur	MJ	1,870	(5.4)	12,476	(5.4)
AP-Foote, Cone & Belding, Kuala Lumpur	MN	1,866	32.3	12,447	32.3
Wings/BBDO, Petaling Jaya	MJ	1,415	17.9	9,438	17.9
Bozell, Petaling Jaya	MN	1,224	17.1	8,159	17.0
Ball Partnership, Kuala Lumpur	MJ	987	14.1	6,582	14.1
Naga DDB Needham DIK, Petaling Jaya	MN	927	NA	5,377	NA
Grey Malaysia, Kuala Lumpur	MN	749	23.1	4,999	24.7
Ramlan & Quay, Kuala Lumpur	NA	483	42.9	3,219	42.9
Francis Lim Zulkifli & Ayer, Petaling Jaya	MN	409	45.3	2,500	45.1
Saatchi & Saatchi Advertising, Kuala Lumpur	MN	175	NA	1,001	NA

■ **Notes:** McCann-Erickson Malaysia includes Mutiara; PTM Thompson 25% owned by J. Walter Thompson Co.

Mexico		Exchange rates: 0.00042 0.00043 peso			
McCann-Erickson, Mexico City	MJ	8,203	61.8	54,711	61.8
Publicidad Ferrer, Mexico City	NA	8,080	38.8	53,867	38.8
J. Walter Thompson de Mexico, Mexico City	MJ	5,651	78.7	37,674	78.7
Publicidad Augusto Elias, Mexico City	NA	5,178	NA	34,517	NA
Leo Burnett Co., Mexico City	MJ	4,961	67.1	33,142	67.5
Panamericana Ogilvy & Mather, Mexico City	MJ	4,861	73.9	33,525	79.7
Bozell S.A., Mexico City	MN	4,750	52.9	31,667	45.8
Garcia Patto, Mexico City	NA	4,061	(3.1)	27,072	(3.1)
DMB&B, Mexico City	MJ	3,933	(24.8)	25,853	(25.9)
Publicidade Oscar Leal, Mexico City	NA	3,744	NA	24,957	NA

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Mexico (continued)					
Scali McCabe Sloves de Mexico, Mexico City	MJ	3,469	(7.5)	23,126	(7.5)
Young & Rubicam, Mexico City	MJ	3,449	85.2	23,008	85.2
Arellano/Ted Bates, Mexico City	MN	2,792	28.4	18,612	28.4
FCB de Mexico, Mexico City	MJ	1,970	26.8	13,137	26.8
Grey Mexico, Mexico City	MJ	1,845	120.1	12,308	120.1
Dieste/BBDO, Mexico City	MN	1,568	74.7	10,855	59.3
DDB Needham, Mexico City	MJ	1,516	36.2	10,113	20.8
Lintas:Mexico, Mexico City	MJ	1,441	67.6	9,614	67.6
Montenegro-Saatchi & Saatchi, Mexico City	NE	1,326	78.0	8,841	78.8
Teran Publicidad, Mexico City	NA	1,058	78.9	7,054	78.9
■ **Notes:** Montenegro-Saatchi & Saatchi non equity affiliation; Publicidad Augusto Elias and Publicidad Oscar Leal gross income figures for both years AA estimates					
Namibia	Exchange rates: 0.37583 0.44310 rand				
Lintas:Namibia, Klein Windhoek	MJ	93	418.4	619	418.4
Netherlands	Exchange rates: 0.47195 0.51120 guilder				
FHV/BBDO Group, Amstelveen	MJ	32,076	(1.6)	213,841	(1.6)
PMSvW/Young & Rubicam, Amsterdam	MJ	23,396	(7.6)	156,055	(7.6)
Ogilvy & Mather (Nederland), Amsterdam	MJ	18,604	(7.6)	128,302	(4.0)
Lintas:Netherlands, Amsterdam	MJ	17,816	12.2	118,832	12.2
PPGH/JWT Group, Amsterdam	MJ	17,650	(5.2)	117,721	(5.2)
Prad Alliance, Amsterdam/Eindhoven	MJ	13,451	(5.2)	89,671	(5.2)
ARA/BDDP, Rotterdam	MJ	13,215	NA	88,009	NA
Saatchi & Saatchi Advertising, Amsterdam	MJ	12,880	15.0	83,535	14.9
Publicis FCB Holland, Amsterdam/Eindhoven	MJ	10,619	NA	70,828	NA
TBWA Groep, Amstelveen	MJ	10,536	23.4	70,226	22.7
DMB&B, Amsterdam	MJ	10,390	(0.6)	55,658	(20.2)
McCann-Erickson Nederland, Amsterdam	MJ	9,180	(1.6)	61,230	(1.6)
Grey, Amsterdam	MJ	8,864	30.6	59,124	30.6
Noordervliet & Winninghoff/Leo Burnett, Amsterdam	MJ	8,523	12.3	56,823	12.3
DDB Needham, Amsterdam	MJ	7,960	9.3	53,092	9.3
Geudeker Oerlemans RSCG, Amstelveen	MJ	5,758	(21.8)	24,258	(49.5)
HDM/VW&A Advertising, Rotterdam	MJ	5,236	(5.2)	34,922	(5.2)
Ted Bates Co., Amsterdam	MJ	5,087	(8.0)	38,330	5.5
De Bussy, Diemen	NA	4,484	3.2	18,878	8.6
HVR Alliance, The Hague	MJ	4,318	2.4	28,789	2.4
Blend Marketing Communications, The Hague	NA	3,610	(3.0)	24,069	(3.0)
ARVH Reklame & Marketing, Zaandam	NE	3,186	9.3	21,238	9.3
VVtH FCA!, Amsterdam	MN	2,950	12.6	19,665	12.6
GGK Amsterdam, Amsterdam	MJ	2,901	(6.5)	20,162	(2.6)
Schulte & Partners, Lochem	NA	2,478	(1.1)	16,518	(0.6)
Ayer Nederland, Deventer	MJ	2,454	14.3	16,361	14.3
Weda, Leeuwarden	NA	2,265	(3.1)	15,102	(3.1)
De Ondernemers, Amsterdam	NA	1,888	2.6	12,507	1.9
Schothorst & Partners, Amsterdam	NA	1,804	(3.9)	12,035	(3.9)
RAL Advertising, Tilburg	NA	1,798	9.9	11,988	10.1
Pieter van den Busken Advertising, Ouderkerk	NA	1,628	(1.2)	10,855	(1.2)
Bozell Advertising, Amstelveen	MJ	1,401	(35.7)	8,092	(33.0)
Klein & Partners/EWDB, Amsterdam	MJ	1,369	(0.8)	16,046	4.6
Lowe Nederland, Amsterdam	MJ	1,218	(4.5)	8,120	(4.6)
Duits Reklame/Marketing, Dordrecht	NA	1,144	22.2	8,495	3.9
Appel Advertising, Naarden	NA	850	10.8	5,663	10.8
Conquest Europe, Amsterdam	MJ	351	30.4	5,562	25.6
■ **Notes:** Lowe Nederland, Weda, ARVH Reklame & Marketing, Appel Advertising, Pieter van den Busken Advertising gross income both years AA estimates; Blend Marketing Communications changed name from Belinfante Major; PMSvW/Y&R includes Wunderman, Cato-Johnson, Burson-Marsteller					
New Zealand	Exchange rates: 0.60458 0.65480 New Zealand dollar				
Clemenger/BBDO New Zealand, Auckland	MN	16,516	(7.8)	82,582	(7.8)
Saatchi & Saatchi Advertising, Wellington	MJ	14,036	4.0	75,496	11.9
J. Walter Thompson New Zealand, Wellington	JV	5,030	44.9	25,151	34.3
Ogilvy & Mather, Wellington	MJ	4,971	10.2	34,286	52.0
DDB Needham, Auckland	MJ	4,654	(25.2)	31,042	5.3
Ted Bates New Zealand, Wellington	MJ	4,215	(2.6)	28,100	29.9
DMB&B, Auckland	MJ	3,631	(26.9)	21,205	(23.3)
Lintas:New Zealand, Auckland	MJ	3,094	(87.3)	20,639	26.9
Young & Rubicam, Auckland	MJ	2,728	11.4	18,196	11.4
Dobbs-Wiggins McCann-Erickson, Auckland	MJ	2,692	(23.3)	17,954	(23.3)
HDM Mattingly, Auckland	MJ	2,391	NA	24,010	NA
Chiat/Day/Mojo, Auckland	MJ	1,983	65.8	9,915	24.4
Leo Burnett-New Zealand, Auckland	MJ	1,866	(10.9)	9,332	(10.9)
Ayer New Zealand, Auckland	MJ	1,061	(46.7)	7,074	(41.7)
A&P Alliance, Auckland	MJ	967	0.5	6,451	1.1
Mainstream/FCB, Auckland	MN	927	24.8	6,182	24.8
Grey Advertising (NZ), Auckland	ND	898	105.0	5,992	105.0
Anderson Hughes Ball, Auckland	MJ	877	6.9	4,383	35.2
■ **Notes:** HDM Mattingly figures are AA estimates; Clemenger/BBDO NZ includes Colenso Communications and HKM/Rialto Advertising; Mainstream/FCB 24.5% owned by Foote, Cone & Belding					
Nigeria	Exchange rates: 0.13605 0.20000 naira				
Insight Communications, Lagos	NE	10,724	228.0	40,197	146.0
Rosabel Advertising, Lagos	NE	558	NA	2,857	NA
■ **Notes:** Rosabel Advertising affiliated with BBDO Worldwide; Insight affiliated with BSB.					
Norway	Exchange rates: 0.14541 0.15400 kroner				
BSB Batesgruppen Norway, Oslo	MJ	21,095	(7.0)	140,633	54.1
Scaneco-Young & Rubicam, Oslo	MJ	12,508	9.4	83,428	9.4
DMB&B Lund & Lommer, Oslo	MJ	5,444	(16.6)	26,329	10.3
Myres/Lintas, Oslo	MJ	5,062	240.9	33,761	240.9
Art & Copy.FCB Group, Oslo	MJ	4,990	32.8	33,282	32.8
Ogilvy & Mather, Oslo	MJ	4,513	(31.9)	31,123	(30.3)
Nordskar & Thorkildsen Leo Burnett, Oslo	MJ	4,101	NA	27,339	NA
Jenssen & Borkenhagen/BBDO, Oslo	MN	3,119	24.1	29,144	26.3
ScanPartner Norge, Oslo	NA	2,975	(37.5)	19,832	(37.5)
Reklamens Hus/McCann, Oslo	MJ	2,743	2.2	18,297	2.2

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Norway (continued)					
Avanti DDB Needham, Oslo	MJ	2,398	NA	15,994	NA
Jensen Grey, Oslo	MN	1,667	(16.1)	11,116	(16.1)
Schjaerven/J. Walter Thompson Co., Oslo	NE	1,624	(0.7)	10,829	(0.7)
Saatchi & Saatchi Advertising, Oslo	MJ	1,243	34.6	8,287	34.5
Jenssen & Borkenhagen 3/BBDO, Oslo	JV	910	11.4	5,147	(7.0)
Bj. Kverneland, Oslo	NA	902	(35.0)	4,929	(29.8)
Copyright Alliance, Oslo	MJ	872	NA	5,816	NA
Jenssen & Borkenhagen 2/BBDO, Oslo	JV	659	(19.6)	4,007	(27.3)
■ **Notes:** Scanpartner Norge gross income figures for both years AA estimates; Schjaerven/JWT non equity affiliation with J. Walter Thompson Co.; Scaneco, Y&R includes Burson-Marsteller.					
Pakistan	Exchange rates: 0.05057 0.05650 rupee				
R:Lintas, Karachi	NE	1,181	(3.3)	7,880	(3.3)
MCM Advertising, Karachi	NA	683	18.5	4,551	18.5
Prestige Communications, Karachi/Lahore	NA	373	(6.1)	3,034	2.0
Manhattan International, Karachi	NE	303	(5.8)	2,023	(5.8)
G.H. Thaver, Karachi	NA	136	16.7	960	16.6
■ **Notes:** R:Lintas non equity affiliation; Manhattan International non equity affiliation with BBDO Worldwide.					
Panama	Exchange rates: 1.00000 1.00000 U.S. dollar				
McCann-Erickson de Panama, Panama City	MJ	513	41.7	3,422	41.6
Rogelio Diaz Publicidad, Panama City	NA	330	50.0	1,500	50.0
Paraguay	Exchange rates: 0.00084 0.00146 guarani				
Almirall y Cia Publicidad, Asuncion	NA	151	(20.9)	504	(21.2)
JWT SA, Asuncion	MJ	116	(12.1)	775	(12.1)
McCann-Erickson, Asuncion	MJ	48	0.6	319	0.6
Peru	Exchange rates: 0.00044 0.01388 inti				
CNP & Grey, Lima	ND	734	NA	4,896	NA
J. Walter Thompson Peruana, Lima	MJ	2,824	NA	13,383	NA
McCann-Erickson, Lima	MJ	1,782	NA	11,886	NA
MIG Publicidad, Lima	NE	1,891	NA	12,616	NA
Perdomo-Ted Bates/Public, Lima	NE	121	NA	684	NA
■ **Notes:** MIG affiliated with Saatchi & Saatchi Advertising; Perdomo-Ted Bates/Public non equity affiliation.					
Philippines	Exchange rates: 0.04743 0.04770 peso				
McCann-Erickson, Manila	MJ	3,869	24.3	25,805	24.3
J. Walter Thompson Co., Manila	MJ	3,111	22.8	21,690	22.2
Ace/Saatchi & Saatchi, Manila	MJ	2,683	27.6	17,896	27.6
Basic/FCB, Manila	MN	2,533	60.3	16,894	60.3
Amacon, Manila	NA	2,513	22.8	17,082	22.8
Hemisphere-Leo Burnett Co., Manila	MJ	1,659	13.0	11,063	13.0
HDM-Alcantara, Manila	MN	1,647	19.5	11,761	21.2
Lintas:Manila, Manila	MN	1,585	22.6	10,570	22.6
PAC/BBDO Worldwide, Manila	MN	1,401	9.9	9,345	9.9
Olbes, Ogilvy & Mather, Manila	MN	1,248	11.7	8,607	15.5
Aspac & Grey, Manila	MN	622	2.1	4,146	2.1
Admakers, Quezon City	NA	589	29.3	3,927	29.3
Atlas Bozell, Manila	NE	236	(1.7)	1,465	7.4
■ **Notes:** Atlas Bozell non equity affiliation; Basic/FCB 30% owned by Foote, Cone & Belding.					
Portugal	Exchange rates: 0.00640 0.00703 escudo				
McCann-Erickson/Hora, Lisbon	MJ	8,651	21.7	57,701	21.7
J. Walter Thompson Publicidade, Lisbon	MJ	6,050	34.0	40,353	34.0
Lintas:Portugal, Lisbon	MJ	5,582	36.4	37,230	36.4
Sistema, Lisbon	MN	5,425	42.9	36,186	43.0
FCB Publicidade, Lisbon	MJ	4,091	6.3	27,274	6.3
Team Young & Rubicam, Lisbon	MN	3,556	10.3	23,719	10.3
Ciesa NCK, Lisbon	MJ	3,316	(1.3)	22,106	(1.3)
Ogilvy & Mather Portugal, Lisbon	MJ	3,177	22.2	21,191	22.2
Publicis, Lisbon	MJ	3,128	39.5	20,857	39.5
BSB Boom, Lisbon	MJ	2,714	17.7	18,087	103.5
DDB Needham & Guerreiro, Lisbon	MJ	2,437	29.1	16,258	25.5
Timing Alliance, Lisbon	MJ	1,695	109.3	11,302	108.3
Bozell Sensus Publicidade, Porto	MJ	1,464	114.1	5,792	9.8
HDM Portugal, Lisbon	MJ	1,363	21.2	9,088	21.2
Antena/BBDO, Lisbon	MN	1,326	8.7	8,810	28.6
Latina, Lisbon	NA	994	(2.9)	4,167	(4.3)
Park Publicidade, Lisbon	MJ	970	59.9	6,466	59.9
Comunicar, Lisbon	MJ	689	(28.6)	4,595	(28.6)
RSCG Portugal, Lisbon	MJ	500	NA	4,165	NA
Ayer Portugal, Lisbon	MN	285	NA	1,899	NA
DMB&B, Lisbon	MJ	208	NA	1,354	NA
■ **Notes:** Sistema minority-owned by Saatchi & Saatchi Advertising; Team Y&R includes Wunderman; McCann-Erickson/Hora includes International Portugal; Park Publicidade and Comunicar, part of Publicis-FCB.					
Puerto Rico	Exchange rates: 1.00000 1.00000 U.S. dollar				
Badillo/Saatchi & Saatchi, San Juan	MJ	12,200	6.1	86,178	12.4
Marti, Flores, Prieto & Wachtel, San Juan	MN	7,850	2.9	52,400	2.9
Young & Rubicam Puerto Rico, San Juan	MJ	6,272	(11.0)	41,834	(11.0)
West Indies & Grey, San Juan	ND	5,275	19.3	35,184	19.3
BBDO Puerto Rico, Hato Rey	MJ	4,181	49.3	27,890	60.3
FCB Puerto Rico, Isla Verde	MJ	3,864	5.0	25,773	5.0
McCann-Erickson, San Juan	MJ	3,558	19.9	23,732	19.9
Leo Burnett Co., San Juan	MJ	3,356	28.4	22,374	28.4
De la Cruz & Goachet, San Juan	MN	2,283	19.8	15,226	19.8
Bozell/CPV Advertising, Santurce	MJ	989	74.9	6,593	74.8
■ **Notes:** Marti, Flores, Prieto & Wachtel 22.5% owned by J. Walter Thompson Co.; Y&R Puerto Rico includes Burson-Marsteller; De la Cruz & Goachet 20% owned by JWT.					
Saudi Arabia	Exchange rates: 0.26680 0.26670 riyal				
Saatchi & Saatchi Advertising, Jeddah	ND	2,100	NA	14,000	NA
Targets Advertising, Jeddah	NE	1,592	23.0	10,601	23.0
Madco Saudi Arabia, Jeddah	NA	810	2.0	4,800	4.3
Orientations, Jeddah	MN	750	13.7	4,716	15.0
DMB&B, Jeddah	MJ	46	(41.1)	329	(42.7)
■ **Notes:** Targets Advertising affiliated with Leo Burnett Co.; Orientations affiliated with Bozell.					

AGENCY INCOME

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Singapore	Exchange rates: 0.51212 0.49360 Singapore dollar				
Batey Communications, Singapore	MN	6,750	NA	44,953	NA
Ogilvy & Mather, Singapore	MJ	5,055	NA	34,863	NA
McCann-Erickson Singapore, Singapore	MJ	3,999	8.6	26,672	8.6
Saatchi & Saatchi Advertising, Singapore	MJ	3,073	48.2	20,485	52.0
Leo Burnett Ltd., Singapore	MJ	2,881	20.9	19,210	20.9
HDM Singapore, Singapore	MJ	2,877	47.6	15,945	45.9
J. Walter Thompson Singapore, Singapore	MJ	2,446	21.0	16,317	21.0
Ko Advertising, Singapore	NA	2,253	14.1	11,267	14.1
Lintas:Singapore, Singapore	MJ	1,706	17.6	11,381	17.6
Grey, Singapore	MN	1,613	29.4	10,760	29.4
Bozell Advertising, Singapore	MJ	1,581	3.0	10,546	3.0
Chiat/Day/Mojo, Singapore	MJ	1,383	13.6	9,255	14.1
BBDO Advertising, Singapore	MJ	1,169	(7.0)	7,795	(7.0)
DMB&B, Singapore	MJ	1,155	63.6	7,417	50.4
Ball Partnership, Singapore	MJ	1,077	51.5	6,247	45.3
Backer Spielvogel Bates, Singapore	MJ	936	(26.0)	7,777	(1.5)
Ketchum/Singapore, Singapore	MJ	929	19.7	6,200	19.7
DDB Needham D.I.K., Singapore	MN	642	47.5	4,281	104.9
Tropical Alliance, Singapore	MJ	476	28.7	3,175	28.7

■ **Notes:** DDB Needham Worldwide holds 25% of Batey Communications, in which Paris-based BDDP holds 20% equity, includes offices in Hong Kong, Taiwan, Malaysia, the Philippines and Los Angeles.

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
South Africa	Exchange rates: 0.38694 0.45510 rand				
Grey Holdings, Johannesburg	MN	14,784	21.6	98,612	21.6
Ogilvy & Mather Rightford, Cape Town	MN	14,124	4.2	97,409	18.6
Lindsay Smithers-FCB, Johannesburg	MN	11,334	0.1	75,599	0.1
Young & Rubicam South Africa, Cape Town	MJ	8,574	(15.6)	57,193	(15.6)
Klerck & McCormac, Johannesburg	NE	7,682	5.6	46,553	5.6
McCann-Erickson DeVilliers, Johannesburg	MJ	6,489	(16.9)	43,281	(16.9)
Lintas:South Africa, Johannesburg	MJ	6,324	20.0	42,181	20.0
J. Walter Thompson South Africa, Johannesburg	MN	4,625	(2.7)	28,029	(11.6)
Bernstein, Loxton, Golding & Klein, Johannesburg	NA	2,364	13.3	14,990	18.8
Partnership in Advertising, Johannesburg	MN	1,874	3.7	12,500	5.8
Louis Wilsenach Group, Doornfontein	NA	1,230	19.1	6,150	19.1
P.N. Barrett, Cape Town	NA	633	(13.4)	4,450	(10.7)

■ **Notes:** Klerck & McCormac, which formerly was Klerck & White, has non-equity affiliation with Saatchi & Saatchi Advertising. Louis Wilsenach non-equity affiliation with Bozell. Lindsay Smithers-FCB and Partnership in Advertising 24% owned by Foote, Cone & Belding. Grey Holdings includes Grey Philips, Bunton Mandel & Blake, Grey Perspectives and Bridge International. Ogilvy & Mather Rightford 40% owned by O&M, includes Meridian, O&M Direct and Liaison PR.

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
South Korea	Exchange rates: 0.00149 0.00134 won				
Cheil Communications, Seoul	NA	64,018	43.1	247,471	27.5
Oricom, Seoul	NA	45,112	38.8	173,002	26.3
LG Ad, Seoul	NE	24,102	26.6	160,677	26.6
Korad Ogilvy & Mather, Seoul	MN	18,794	30.8	118,949	31.4
Daehong Ad, Seoul	NE	16,185	37.9	156,207	22.4
Diamond Ad, Seoul	MN	12,456	31.5	69,647	34.4
Seoul Advertising, Seoul	NA	7,120	54.6	52,880	36.4
Nara Communications, Seoul	NA	3,944	6.5	27,371	(4.8)
Eastern Ad Co., Seoul	NE	1,366	35.9	8,613	28.6

■ **Notes:** Diamond Ad 10% owned by Backer Spielvogel Bates. Eastern Ad non-equity affiliation with N W Ayer; Daehong Advertising non-equity affiliation with DDB Needham Worldwide; Cheil Communications, formerly known as Korea First, has non-equity affiliation with Bozell; LG Ad non-equity affiliation with BBDO Worldwide.

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Spain	Exchange rates: 0.00842 0.00857 peseta				
Grupo BSB, Madrid	MJ	37,907	28.6	252,836	22.4
TAPSA/N W Ayer, Madrid	MJ	27,198	54.9	198,838	69.8
McCann-Erickson S.A. Group, Madrid	MJ	26,626	15.4	177,593	15.4
BBDO Espana, Barcelona	MJ	25,966	64.5	183,292	54.2
Lintas:Spain, Madrid	MJ	24,686	27.2	164,653	27.2
J. Walter Thompson Co., Madrid	MJ	23,240	7.5	164,316	13.9
TAPSA Ayer, Madrid	MJ	22,315	27.1	148,838	27.1
Bassat Ogilvy & Mather, Madrid	MJ	22,088	54.5	152,332	60.0
Young & Rubicam Espana, Madrid	MJ	21,681	80.0	144,610	80.0
RCP-Saatchi & Saatchi, Barcelona	MJ	18,375	49.2	120,715	48.6
HDM Spain, Madrid	MJ	17,118	25.8	114,175	25.8
Danis-Benton & Bowles, Barcelona/Madrid	MJ	13,197	12.6	92,990	11.4
Contrapunto, Madrid	MN	11,822	15.0	78.811	15.0
Tandem/DDB Needham, Madrid	MJ	11,732	(1.9)	120,415	10.0
Arge, Madrid	MJ	8,637	26.8	57,582	34.4
Grupo Barro, Madrid	MJ	8,250	NA	55,000	NA
Cid Publicidad, Madrid	MN	7,789	(11.3)	57,719	(4.4)
Grey Espana, Madrid/Barcelona	MJ	7,713	19.2	51,444	19.2
GGK, Madrid/Barcelona	MJ	7,322	225.8	48,836	225.4
Leitmotiv RSCG, Madrid	MJ	6,905	50.0	46,310	35.1
Ricardo Perez Asociados, Madrid	NA	6,736	22.8	50,520	37.1
BCK Alliance, Barcelona/Madrid	MJ	6,441	24.4	42,942	24.6
Leo Burnett Co., Madrid	MJ	5,873	28.9	39,157	28.9
EWDB Espana, Madrid	MJ	5,566	NA	35,701	NA
TBWA-Espana, Madrid	MJ	5,422	40.0	36,139	39.9
Publicis.FCB, Madrid	MJ	4,547	(6.4)	30,337	(6.3)
Slogan, Barcelona	NA	4,479	91.0	29,470	91.0
BDDP/Solucion Diagonal, Madrid/Barcelona	MJ	4,159	95.1	27,702	95.4
Lowe Dos Por Dos, Barcelona	MJ	3,693	24.9	24,622	24.9
Rilova, Zamorano, Rodriguez, Madrid	MJ	3,626	169.8	22,506	153.3
Vigelands, Madrid	MN	2,593	19.6	15,291	19.8
Bozell Espana, Madrid	MJ	1,785	184.7	12,352	494.0
Conquest Europe, Madrid	MJ	1,215	34.3	12,859	30.9
Moline & Publicis, Barcelona	MJ	1,122	48.3	9,332	48.2
Armando Testa, Barcelona	MJ	724	NA	7,999	NA

■ **Notes:** McCann-Erickson includes McCann-Erickson Spain, McCann-Erickson Clarin Publicidad, Iniciativas de Medios, Spain Epic and M-E Universal; Contrapunto 30% owned by BBDO Worldwide; Cid Publicidad 25% owned by FCA! Group, Paris; TAPSA Ayer includes Equipo Tres, CICM and Ayer Direct; Y&R Espana includes Wunderman, Cato-Johnson and Burson-Marsteller; Grupo BSB includes Bates Espana in Madrid, Barcelona and 10 regional offices, plus Delvico/Bates and Central Media in Madrid, Barcelona and Valencia, Howard Marlboro Group and Final Art; Slogan, Lowe Dos Por Dos gross income for both years AA estimate; Lintas includes Iniciativas de Medios; Vigelands, part of London-based Crossworlds Group; BBDO/Espana includes Tiempo/BBDO in Madrid and Barcelona; Grupo Barro 60% owned by London-based Collett Dickenson Pearce.

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Sri Lanka	Exchange rates: 0.02500 0.03924 rupee				
Thompson (Lanka), Colombo	MN	411	(6.7)	2,744	(6.7)
Minds Lanka, Colombo	MN	75	(9.0)	350	(10.8)

■ **Notes:** Grant/Bozell, minority-owned by Bozell, did not submit figures; Thompson (Lanka) 24.5% owned by J. Walter Thompson Co.; Minds Lanka 40% owned by Bozell.

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Sweden	Exchange rates: 0.15595 0.16300 kroner				
Young & Rubicam, Stockholm	MJ	19,879	136.9	132,594	136.9
Swedish Communications, Stockholm	MJ	14,815	17.9	98,818	17.9
BSB Sweden, Stockholm	MJ	13,945	(8.6)	92,971	(2.3)
Intermarco/FCB, Stockholm	MJ	8,453	(6.2)	56,355	(6.3)
McCann-Erickson Sweden, Stockholm	MJ	7,996	12.0	53,335	12.0
HLR & Co./BBDO, Stockholm	MN	5,189	10.1	29,319	NA
Carlsson & Broman/DDB Needham, Stockholm	MJ	4,338	279.9	28,938	610.1
Soren Blanking, Malmo/Stockholm	NA	4,242	0.5	23,564	0.7
Lintas:Sweden, Stockholm	MJ	4,186	15.7	27,921	15.7
KREAB, Stockholm	NA	3,736	NA	24,905	NA
DMB&B, Stockholm	MJ	3,478	12.3	32,978	6.4
Alliance Sverige, Stockholm	MJ	3,275	25.6	21,833	25.5
Saatchi & Saatchi/Laurent, Stockholm	MJ	3,259	(1.2)	21,740	(1.2)
HDM/MK, Stockholm	MJ	3,042	16.6	27,371	57.3
Saatchi & Saatchi Advertising, Stockholm	MJ	2,963	NA	19,764	NA
Welinder, Stockholm	NA	2,916	15.4	21,989	15.3
Blomquist, Stockholm	NA	2,848	(19.0)	16,584	(34.8)
Ehrenstrahle & Co., Stockholm	MJ	2,828	(24.7)	18,856	(24.7)
Lyberg Annonsbyra, Stockholm	NA	2,714	(11.3)	21,858	(5.9)
Ogilvy & Mather 2AB, Stockholm	MJ	2,640	(23.0)	17,612	(23.0)
J. Walter Thompson Co., Stockholm	MJ	2,588	32.3	14,142	8.4
RSCG Hawl, Stockholm	MJ	1,716	26.8	11,439	27.1
Roennberg & Co., Stockholm	NA	1,413	6.2	9,422	6.2
Affaersinformation, Stockholm	NE	1,138	16.4	3,119	3.4
Garbergs Annonsbyra, Stockholm	NA	672	16.0	4,482	16.0
Turbin/Landia Annonsbyra, Stockholm	NA	655	3.0	4,367	3.0
Conquest Europe, Stockholm	MJ	599	70.8	3,995	70.8
Bozell/Svensk Reklamtjaenst, Stockholm	NE	546	(1.5)	1,154	5.7
Producentgruppen, Stockholm	NA	413	NA	2,308	NA

■ **Notes:** Roennberg, Garbergs Annonsbyra, Turbin/Landia Annonsbyra gross income for both years AA estimates; Affaersinformation affiliated with N W Ayer; HLR & Co./BBDO 40% owned by BBDO Worldwide; Ehrenstrahle & Co. 78% owned by BBDO Worldwide; Young & Rubicam includes Wunderman, Cato-Johnson, Burson-Marsteller; Producentgruppen group of small agencies working in the same building in Stockholm; Swedish Communications, a Grey agency, offices in Goteborg, Halmstad and Malmoe, includes Grey Stockholm, Observera, Claesson & Co.

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Switzerland	Exchange rates: 0.62005 0.69210 Swiss franc				
Advico Young & Rubicam, Zurich	MJ	16,147	124.4	118,621	147.1
GGK, Basel/Zurich	MJ	13,585	(5.7)	95,202	(0.9)
ASGS/BBDO, Zurich	MN	10,816	(7.3)	72,145	(7.0)
Wirz Advertising, Zurich	MJ	10,603	3.0	70,748	3.6
HDM Marketing Kommunikation, Zurich	MJ	9,782	(4.0)	65,245	(4.0)
Farner Publicis.FCB, Zurich	MJ	8,758	(5.0)	59,041	(3.5)
McCann-Erickson Switzerland, Geneva/Zurich	MJ	8,523	(7.5)	56,849	(7.5)
Lintas:Zurich, Zurich	MJ	5,670	(17.0)	37,819	(17.0)
Marti, Ogilvy & Mather, Zurich	MJ	5,523	15.7	38,092	19.6
Impuls, Zurich	NE	5,227	3.5	35,033	2.9
Grey, Geneva	MN	4,988	(2.6)	33,268	(2.6)
Marsden, Hartmann & Leo Burnett Co. AG, Zurich	MJ	4,097	(23.8)	27,317	(23.8)
J. Walter Thompson Co., Zurich/Lucerne	MJ	3,632	46.6	24,215	51.1
DDB Needham, Kuesnacht/Zurich	MJ	3,535	(8.6)	23,578	(8.6)
Bozell S.A., Geneva	NE	3,442	20.6	21,086	15.1
Saatchi & Saatchi BC, Geneva	MJ	3,224	10.9	21,570	14.0
TBWA, Zurich	MJ	3,069	(4.6)	20,462	(4.6)
Cash RSCG, Zurich	MJ	1,737	(10.4)	11,780	(10.4)
Zogg Kettiger Gasser Werbeagentur, Zurich	NA	1,618	1.7	10,795	1.7
Team Ltd., Zurich	NA	1,488	(2.3)	5,580	0.8
DMB&B, Zurich	MJ	1,244	(11.9)	8,104	(27.0)
Peter Berg, Zurich	NA	1,190	30.2	7,875	29.3
Kern & Kern, Zurich	NA	744	7.5	3,720	7.5
Conquest Europe, Zurich	MJ	310	20.1	2,156	25.2
Rogivue Consulting, Laax-Cons	NA	154	(9.9)	992	9.8
Muller & Partner Alliance, Zurich	MN	150	NA	1,000	NA

■ **Notes:** McCann-Erickson Switzerland includes Unimedia and Services; Bozell S.A. non equity affiliation; Farner Publicis FCB includes Astoria Publicis FCB, a joint venture, and BEP Publicis FCB; Advico Y&R includes Wunderman, Cato-Johnson and Burson-Marsteller; Impuls non equity affiliation with Saatchi & Saatchi Advertising; ASGS/BBDO 34% owned by BBDO Worldwide.

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Taiwan	Exchange rates: 0.03665 0.03480 Taiwan dollar				
McCann-Erickson (Taiwan), Taipei	MJ	6,107	43.2	40,736	43.2
Ogilvy & Mather (Taiwan), Taipei	MJ	5,174	38.6	34,512	38.6
Hwa Wei & Grey, Taipei	MN	4,618	54.0	30,801	54.0
Leo Burnett Co., Taipei	MJ	3,295	46.1	21,965	46.1
Bozell CCAA, Taipei	MN	3,181	18.9	22,723	14.6
Eastern Advertising, Taipei	NA	3,179	24.2	21,477	25.4
J. Walter Thompson Taiwan, Taipei	MJ	3,060	361.9	20,158	356.1
Saatchi & Saatchi Gaynor, Taipei	MJ	3,002	24.1	20,025	86.9
International Advertising, Taipei	NA	2,750	31.4	18,332	31.4
Regal International, Taipei	NA	2,694	(14.0)	17,959	(14.0)
Lintas:Taiwan, Taipei	MJ	2,459	29.4	16,404	29.4
Target Advertising, Taipei	NA	2,337	35.4	14,609	35.4
Stentor/BBDO Advertising, Taipei	MJ	2,325	33.6	19,058	33.6
Public Communications, Taipei	NA	2,126	35.7	14,660	40.4
DDB Needham, Taipei	MJ	1,462	49.0	9,750	63.7
Ball Partnership, Taipei	MJ	1,429	NA	7,084	NA
HDM Taiwan, Taipei	MJ	868	NA	5,097	NA
BSB Taiwan, Taipei	MJ	742	NA	4,293	NA
Golden Flower Advertising, Taipei	NA	724	56.6	9,529	44.1

■ **Notes:** Target Advertising affiliated with N W Ayer; McCann-Erickson Taiwan merged with United Advertising in 1989. M-E holds 70%; Regal International, International Advertising and Stentor/BBDO gross income for both years AA estimates; Eastern Advertising has joint venture with Tokyu, Tokyo, and an affiliation with Standard Advertising. Bozell CCAA 45% owned by Bozell.

AGENCY INCOME

Thailand

Exchange rates: 0.0391 0.04174 baht

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Lintas:Thailand, Bangkok	MJ	7,197	7.2	48,006	7.2
Ogilvy & Mather, Bangkok	MJ	5,611	40.0	38,696	40.3
Far East Advertising, Bangkok	MN	4,271	16.9	28,483	47.6
Spa Advertising Co., Bangkok	NA	3,365	34.4	16,904	34.1
Saatchi & Saatchi Advertising, Bangkok	MJ	3,015	622.4	20,110	588.3
Leo Burnett Ltd., Bangkok	MJ	2,818	176.4	18,790	176.4
Prakit & FCB, Bangkok	MN	2,739	21.5	18,274	21.6
McCann-Erickson Thailand, Bangkok	MJ	2,167	17.8	14,455	17.9
HDM, Bangkok	MJ	2,113	26.6	14,087	29.8
J. Walter Thompson Co., Bangkok	MJ	1,971	13.4	12,114	11.5
DMB&B, Bangkok	MN	1,112	4.1	7,117	6.6
Damask Advertising, Bangkok	NA	1,096	75.0	5,870	36.5
Amex & Grey, Bangkok	MN	931	8.6	7,516	31.4
Ball Partnership, Bangkok	MJ	735	57.0	4,903	57.0
BSB Thailand, Bangkok	MJ	540	NA	1,174	NA
Mayford Ltd., Bangkok	NA	176	(15.6)	1,174	(14.8)

■ **Notes:** Far East Advertising 10.02% owned by DDB Needham Worldwide, Mayford Ltd. gross income for '89 AA estimate.

Trinidad

Exchange rates: 0.23529 0.25870 Trinidad dollar

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
McCann-Erickson Trinidad, Port of Spain	MJ	2,050	(2.5)	13,674	(2.5)
Lonsdale/Saatchi & Saatchi, Port of Spain	MN	948	44.8	6,324	39.0
Hernandez/FCB, Port of Spain	MN	574	16.6	3,830	16.6

Turkey

Exchange rates: 0.00050 0.00080 lira

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Cenajans-Grey Reklamcilik, Istanbul	MN	4,900	10.7	29,696	9.4
Manajans/Thompson, Istanbul	MN	3,928	4.8	20,557	5.9
Guzel Sanatlar, Istanbul	NE	3,448	30.6	22,985	30.6
Ajans Ada, Istanbul	NA	3,245	28.4	21,769	27.4
McCann-Erickson Pars, Istanbul	MJ	3,124	17.2	20,834	17.2
RPM/Radar, Istanbul	MN	2,415	NA	16,099	NA
Moran, Ogilvy & Mather, Istanbul	MN	2,126	(7.2)	12,527	(12.1)
Grafika:Lintas, Istanbul	MN	1,961	31.1	13,079	31.1
Merkez Ajans Reklam, Istanbul	NA	1,578	(1.3)	8,137	0.2
Reklamevi, Istanbul	NE	1,177	42.0	8,955	56.7
Markom/Leo Burnett, Istanbul	MN	924	30.4	6,157	30.4
Yaratim/FCB, Istanbul	MN	921	27.0	6,138	27.0
RPM Reklam Paz. Mus., Istanbul	NA	859	45.7	5,808	47.3
Birlesik Reklamcilar, Istanbul	NA	851	NA	6,340	NA
Ajans Ekol Reklam, Istanbul	NA	741	10.6	5,575	24.9
Rota Advertising, Istanbul	NE	545	(14.1)	4,548	(20.0)
Repro Reklam Ajansi, Istanbul	NA	501	19.4	3,025	(15.6)
HDM/Fulmar, Istanbul	MN	493	NA	3,288	NA
IRA Reklam Ajansi, Istanbul	NA	492	19.7	4,225	22.2
Admar Reklam ve Pazarlama, Istanbul	NE	484	34.6	4,629	70.2
Ajans Ultra Reklam, Istanbul	NA	478	(6.4)	2,767	8.1
Era Tanitim Yayin Hizmetleri, Istanbul	NA	424	(5.6)	4,024	(1.5)
Parajans, Istanbul	NA	424	NA	2,706	NA
Birikim Reklamcilik, Istanbul	NA	345	41.9	2,689	43.9
Ilancilik Reklam, Istanbul	NA	129	(32.4)	5,121	(5.5)
Manset Reklam, Istanbul	NA	78	NA	704	NA

■ **Notes:** Reklamevi non-equity affiliation with Young & Rubicam. Guzel Sanatlar gross income for both years AA estimate. Non-equity affiliaton with Saatchi & Saatchi Advertising. Cenajans/Grey 30% owned by Grey; Manajans/Thompson 25% owned by J. Walter Thompson Co.; Yaratim/FCB 30% owned by Foote, Cone & Belding; Rota Advertising affiliated with Backer Spielvogel Bates; Admar Reklam ve Pazarlama affiliated with DDB Needham Worldwide; RPM/Radar 30% owned by London-based Collett Dickenson Pearce.

Uruguay

Exchange rates: 0.0019 0.00330 peso

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Corporacion/Thompson, Montevideo	NE	822	(13.5)	5,479	1.5
McCann-Erickson, Montevideo	MJ	323	(10.1)	2,156	(10.1)
Grey Uruguay, Montevideo	MN	315	(0.5)	2,102	(0.5)

U.S. agencies with overseas billings

Exchange rates: From dollars

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
McCann-Erickson Worldwide, New York		506,363	10.1	3,377,441	10.1
Saatchi & Saatchi Advertising Worldwide, New York		494,780	19.5	3,271,051	15.0
Young & Rubicam, New York		455,838	18.5	3,135,693	20.7
Backer Spielvogel Bates Worldwide, New York		449,171	10.3	2,985,231	10.0
Ogilvy & Mather Worldwide, New York		394,560	11.4	2,723,515	21.8
Lintas:Worldwide, New York		368,465	9.7	2,457,662	9.7
J. Walter Thompson Co., New York		359,861	19.2	2,556,535	23.5
HDM, New York		337,601	43.6	2,004,719	49.7
BBDO Worldwide, New York		283,042	15.3	1,893,997	15.7
Grey Advertising, New York		258,193	26.1	1,662,117	21.7
DDB Needham Worldwide, New York		249,920	60.7	1,709,126	56.6
D'Arcy Masius Benton & Bowles, New York		239,190	9.1	1,747,846	11.6
Foote, Cone & Belding Communications, Chicago		230,393	9.6	1,542,756	8.9
Leo Burnett Co., Chicago		195,017	18.2	1,300,182	18.2
TBWA Advertising, New York		90,428	21.8	605,387	16.9
NW Ayer Inc., New York		81,663	42.2	539,121	34.5
Scali, McCabe, Sloves, New York		48,027	36.7	279,802	32.7
Chiat/Day/Mojo, Venice, Calif.		44,000	33.3	275,000	17.3
Bozell Inc., New York		35,250	21.8	235,000	21.8
W.B. Doner, Southfield, Mich.		7,904	62.2	72,065	108.5
Hill, Holliday, Connors, Cosmopulos, Boston		7,633	7.1	50,914	7.1
Ketchum Communications, Pittsburgh		4,807	(38.5)	60,800	21.6
Kert Advertising, Ft. Lauderdale, Fla.		2,907	(1.5)	20,014	(10.8)
Telephone Marketing Programs, New York		2,700	48.8	17,900	47.9
Griffin Bacal, New York		1,742	8.9	13,509	13.5
Lally, McFarland & Pantello, New York		500	100.0	4,020	142.9
Brady Co., Menomonee Falls, Wis.		431	55.5	2,875	55.5
Wells, Rich, Greene, New York		NA	NA	2,000	0.0

■ **Notes:** Parent agencies and the amount of contribution in international gross income and billings (in millions) received from subsidiaries: Saatchi & Saatchi—$0.9/$6.1 from McCaffrey & McCall; Young & Rubicam—$33.2/$221.3 from Wunderman Worldwide, $27.2/$181.1 from Cato Johnson Worldwide, $8.2/$54.9 from Sudler & Hennessey, and $109.5/$747.3 from its percentage ownership in HDM outside the U.S.; DDB Needham Worldwide—$8.3/$55.5 from Bernard Hodes Group, and $4/$27 from Kallir, Philips, Ross; BBDO Worldwide—$1.1/$9 from Doremus & Co.; D'Arcy Masius Benton & Bowles—$31.6/$229.9 from Medicus Intercon International; Backer Spielvogel Bates Worldwide—$14/$93.3 from Kobs & Draft; Foote, Cone & Belding Communications—$186.7/$1,320 from its 49% holding in Publicis FCB B.V., its alliance in Europe with Publicis Communications.

U.S.S.R.

Exchange rates: 0.16800 0.00000 ruble

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Y&R/Sovero, Moscow	JV	273	NA	545	NA
Tisza, Ogilvy & Mather, Moscow	MN	34	NA	232	NA

■ **Notes:** Y&R/Sovero is a joint venture.

Venezuela

Exchange rates: 0.02688 0.03130 bolivar

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Corpa, Caracas	MN	7,144	24.1	49,269	25.3
Leo Burnett-Venezuela, Caracas	MJ	3,752	32.4	25,014	32.4
J. Walter Thompson de Venezuela, Caracas	MJ	3,176	(13.6)	21,174	(13.6)
JMC Creatividad/Young & Rubicam, Caracas	NE	2,935	17.1	19,569	17.1
ABC-McCann Publicidad, Caracas	MJ	2,714	14.3	18,104	14.3
FCB/Siboney/Uribe, Caracas	MJ	2,424	36.5	16,170	36.5
Fischer-Grey, Caracas	ND	2,393	54.7	15,963	54.7
AW/Saatchi & Saatchi, Caracas	MN	1,793	31.4	11,954	31.4
Publicistas Venezolanos, Caracas	MN	1,157	52.8	5,510	60.0
BSB Ghersy Quintero, Caracas	NE	1,107	17.9	7,392	15.2
Vapro Publicidad, Caracas	NE	609	0.8	4,785	3.3
DMB&B de Venezuela, Caracas	MN	403	NA	2,016	NA

■ **Notes:** Corpa 19.9% owned by Ogilvy & Mather; BSB Ghersy Quintero non equity affiliation with Backer Spielvogel Bates; DMB&B de Venezuela 19.99% owned by DMB&B; Publicistas Venezolanos 19% owned by BBDO Worldwide; Vapro Publicidad non-equity affiliation with Bozell.

West Germany

Exchange rates: 0.5328 0.57220 mark

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Lintas:Germany, Hamburg	MJ	52,322	0.4	348,986	0.4
Ogilvy & Mather Germany, Frankfurt	MJ	46,200	10.3	318,621	14.1
BBDO Group Germany, Duesseldorf	MJ	46,062	(4.2)	307,235	(4.2)
McCann-Erickson Germany, Frankfurt	MJ	44,552	(0.3)	297,158	(0.3)
Young & Rubicam, Frankfurt	MJ	39,561	(10.2)	263,876	(10.2)
HDM Germany, Duesseldorf	MJ	39,062	1.6	260,541	1.6
Grey Gruppe Deutschland, Duesseldorf	MJ	38,008	10.0	253,515	10.0
BSB Deutschland Holding, Frankfurt	MJ	31,500	(0.3)	209,996	(0.4)
DMB&B, Duesseldorf/Frankfurt	MJ	31,215	(5.3)	283,712	(2.2)
Saatchi & Saatchi Advertising, Frankfurt	MJ	31,082	7.4	207,315	5.8
Wensauer DDB Needham, Munich	MJ	28,827	26.3	192,274	17.9
Michael Conrad & Leo Burnett, Frankfurt	MJ	23,340	12.5	155,607	12.5
J. Walter Thompson Co., Frankfurt	MJ	21,817	(11.8)	145,516	(11.8)
Wilkens Ayer, Hamburg	MJ	20,343	5.6	135,689	(2.2)
Scholz & Friends, Hamburg	MJ	19,502	(1.2)	130,015	(1.2)
Lowe Luerzer, Frankfurt	MJ	18,387	14.7	122,577	14.7
TBWA, Frankfurt	MJ	17,808	14.1	118,720	14.0
Baums, Mang & Zimmerman, Duesseldorf	MN	13,481	2.0	89,919	2.0
Springer & Jacoby, Hamburg	NA	12,850	11.4	95,913	0.4
Heye & Partner/DDB Needham, Munich	MN	12,134	4.2	80,934	4.2
Hildmann Simon Rempen Schmitz SMS, Duesseldorf	MJ	11,981	18.1	79,914	18.0
Serviceplan Werbeagentur, Munich	NA	11,835	7.7	78,942	7.7
Publicis Germany, Duesseldorf	MJ	11,439	(17.2)	76,296	(15.5)
RSCG Butter Rang, Duesseldorf	MJ	10,710	40.7	71,402	30.8
von Mannstein Werbeagentur, Solingen	NA	9,091	(4.3)	60,638	(4.4)
MWI Markenwerbung, Hamburg	MJ	7,909	(0.5)	52,754	(0.5)
GGK Communications, Duesseldorf/Frankfurt	MJ	6,447	(30.4)	43,001	(30.7)
Agenta Werbeagentur, Muenster	NA	5,592	4.9	37,300	5.1
Gueltig & Hoffmeister Alliance, Frankfurt	MN	3,837	14.6	25,587	14.6
FCB Frankfurt, Frankfurt	MJ	3,449	(28.0)	23,006	(28.0)
Gruppe Marketing & Werbung, Frankfurt	MN	3,091	28.6	21,048	29.1
Dongowski & Simon Agentur, Stuttgart	NA	3,037	1.1	20,248	1.1
Komplett Buro, Frankfurt	MN	2,600	NA	17,300	NA
Schmittgall Werbeagentur, Stuttgart	NA	2,504	36.8	16,785	33.3
Bozell Werbeagentur, Frankfurt	MJ	2,339	32.3	15,602	32.4
Holtkamp Muller Kentenich & May, Duesseldorf	MJ	1,865	NA	12,421	NA
Wirz & Hafner Werbeberatung, Frankfurt	MJ	1,492	(2.3)	9,952	(2.3)
V und B/EWDB, Hamburg	MJ	1,409	NA	9,401	NA
Durana Ketchum, Frankfurt	MJ	1,289	NA	8,601	NA
Logo-FCA!, Duesseldorf	MJ	1,279	10.8	8,537	10.8
FCB Direct Marketing, Hamburg	MJ	812	(11.5)	5,413	(11.5)
Conquest Europe, Frankfurt	MJ	693	28.4	4,644	28.9
Publicis FCB Direkt, Frankfurt	MJ	389	NA	2,594	NA

■ **Notes:** McCann-Erickson Germany includes McCann-Erickson international, Universal-Kommunikations, M-E Intensiv, Art Work, Promotion, Healthcare, Media Intensiv and Krakow; Komplett Buro 40% owned by Ketchum Intl.; Holtkamp Muller Kentenich & May, part of Paris-based BDDP Group; Y&R includes Wunderman, Cato-Johnson, Sudler & Hennessey, Burson-Marsteller; Baums, Mang & Zimmermann 49% owned by Publicis FCB; Lowe Luerzer, Dongowski & Simon gross income for both years AA estimate; Gruppe Marketing & Werbung part of the London-based Crossworld group; HDM Germany includes figures for R.W. Eggert; FCB Frankfurt agency will be closed in March 1990; BSB Deutschland Holding includes Cerca, Ted Bates Werbeagentur and Scholz & Friends. Figures for the latter are listed separately.

Yugoslavia

Exchange rates: 0.00000 0.00065 dinar

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
SM Alliance, Ljubljana	MN	4,200	NA	28,000	NA

Zambia

Exchange rates: 0.05520 0.14000 kwacha.

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Young & Rubicam Zambia, Lusaka	MJ	321	(38.0)	2,141	(38.0)
Peter Gilbert Advertising, Lusaka	NE	62	(55.6)	219	(47.6)

■ **Notes:** Peter Gilbert Advertising non-equity affiliation with Saatchi & Saatchi Advertising.

Zimbabwe

Exchange rates: 0.44480 0.54950 Zimbabwe dollar

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Barker, McCormac Group, Harare	NE	2,264	33.3	9,869	29.8
Lintas:Zimbabwe, Harare	MJ	937	24.5	6,249	24.5
Michael Hogg/Young & Rubicam, Harare	MN	330	(74.5)	2,201	(74.5)

■ **Notes:** Barker, McCormac Group non-equity affiliation with Saatchi & Saatchi Advertising.

In at presstime

Exchange rates: see countries

Agency, city	Outside equity	Gross income	% chg	Billings	% chg
Tamir-Cohen, Tel Aviv	NA	3,000	5.3	20,000	5.3
Grant/Bozell, Colombo	MN	750	(26.5)	2,500	(25.0)
Bozell Wymans Bogaerts, Brussels	MJ	1,487	NA	9,912	NA
Synergie Communications, Bangkok	NE	960	(24.3)	4,000	(23.2)
Scanpartner Sverige, Gothenburg	NA	1,586	NA	10,573	NA
East Meridian Communications, Brussels	MJ	1,286	NA	8,582	NA
Euro Meridian Communications, Amsterdam	MJ	689	NA	4,598	NA

The Top 100 in 46th agency report

For top to bottom, it's Dentsu at $1.3 billion to Rubin Postaer at $17.4 million in billings

RANK: 68

Abbott Mead Vickers, SMS

London
Gross income: **$25.8** million

■ **Income & volume** ($ in millions)

Worldwide	1989	1988	% chg
Gross income	25.8	23.6	8.9
Volume	194.4	177.6	9.4

■ **Workforce & facilities**

Worldwide	1989	1988	% chg
Employees	210	180	16.7
Offices	NA	NA	NA

■ **Annual review**

Higher interest rates and a sluggish U.K. stock market have temporarily gridlocked a stock buyback deal in which AMV would unite with Scali, McCabe, Sloves (which owns 23% of AMV) to create a holding company whose shares would be used to reduce WPP Group's ownership in Scali from 80% to 20%. AMV's billings slowed to a 9.4% increase in 1989 after a strong 35% push in 1988. This agency owns 76% each of Leagas Delaney Ltd. and Lippa Newton Ltd. in London, along with 100% of a sales promotion subsidiary, McBain Noel Johnson.

■ **Accounts**

Gained: Hoover, Sedgewick, Western Union, British Medical Assn., Milk Marketing Board, Rexel, Katharine Hamnett, Homebase.

Lost: Sealink, Britvic, Link House.

■ **Officers**

David Abbott, joint chmn-creative dir; Peter Mead, joint chmn; Adrian Vickers, dep chmn; Michael Baulk, managing dir-ceo.

■ **Headquarters**

Abbott Mead Vickers SMS Limited
191 Old Marylebone Road
London NW1 5DW
Phone: 01 402 4100
Fax: 441 935 5863

RANK: 47

Admarketing Inc.

Los Angeles
Gross income: **$44.9** million

■ **Income & volume** ($ in millions)

Worldwide	1989	1988	% chg
Gross income	44.9	40.4	11.1
Volume	252.0	224.5	12.2
U.S.			
Gross income	44.9	40.4	11.1
Volume	252.0	224.5	12.2

■ **Workforce & facilities**

Worldwide	1989	1988	% chg
Employees	133	138	(3.6)
Offices	1	1	0.0

■ **Annual review**

Growth of 15% is expected in billings in 1990 as the agency produces a full-year of work for new accounts gained during 1989—including Ortho Mattress ($8-10 million), Public Storage ($10 million), and Sav-On/Osco. Such gains helped push billings up 12.2% in 1989, and produce $37.5 million in new billings. Existing accounts provided $19 million in billing's growth, while departing accounts including Circuit City Stores ($15 million) took away $29 million in billings.

■ **U.S. accounts**

Gained: The Good Guys Stores, Ortho Mattress, RB Furniture, Public Storage.

Lost: Circuit City Stores, Home Club.

■ **Officers**

Jack Roth, president-ceo; Robert Recht, chmn; Robert Roth, treasurer; Martin Cagan, exec vp; Denis Kalscheur, exec vp-cfo; Howie Kradow, exec vp, creative; George Abdell, Arlynn Whittaker, Frank Farrell, sr vps-acct supers; Patricia Gleason, vp-national media director; Larry Mandel, vp-California media director.

■ **Headquarters**

Admarketing Inc.
1801 Century Park East
Los Angeles, Calif. 90067
Phone: (213) 203-8400
Fax: (213) 277-7621

Holding companies interlock

Holding companies now are buying into each other: FCB and Publicis have exchanged stock, as have WCRS and Eurocom and Interpublic and Lowe Group PLC, the latter now 35.4% owned by Interpublic (in exchange for Lowe's purchase of the rest of Lowe Marschalk). □

RANK: 75

Allen Brady & Marsh

London
Gross income: **$23.8** million

■ **Income & volume** ($ in millions)

Worldwide	1989	1988	% chg
Gross income	23.8	22.5	5.7
Volume	158.4	149.9	5.7

■ **Workforce & facilities**

Worldwide	1989	1988	% chg
Employees	128	142	(9.9)
Offices	NA	NA	NA

■ **Annual review**

ABM experienced a year of staff departures and changes in creative direction as billings rose a healthy 13.1% in pounds, which included a new campaign for John Player Special ($11.7 million account) and coordination of TV spending ($33.5 million) for Britvic Corona. The Lowe Group PLC agency believed it had a bead on the Conservative Party account, but the work now is expected to be spread around.

■ **Accounts**

Gained: BBC, National Trust, Conservative Party (Europe elections), Adams Foods (Kerrygold), Imperial Tobacco (Embassy Mild, Celebrated Best Counter, St. Bruno).

Lost: Weetabix, Caradon Everest (double glazing).

■ **Officers**

John Wood, chmn; David Grey, president.

■ **Headquarters**

Allen Brady & Marsh
912 Tavistock Square
London WC1H 9SX, UK
Phone: 01-388-1100
Fax: 441-388-2469

RANK: 90

Alliance International U.K.

London
Gross income: **$20.1** million

■ **Income & volume** ($ in millions)

Worldwide	1989	1988	% chg
Gross income	20.1	20.7	(3.1)
Volume	133.9	138.2	(3.1)

■ **Workforce & facilities**

Worldwide	1989	1988	% chg
Employees	345	282	22.3
Offices	NA	NA	NA

■ **Annual review**

The agency, which grew only 1.4% in billings in pounds in 1989, served as a fulcrum for its parent, Lopex Group PLC, to create a single advertising identity in the UK. The agency got its new name when Lopex acquired Rex Stewart Group UK and merged Stewart's Wethey Scott Pocock agency into ASL Alliance/Alliance UK to form Alliance International UK, which also got Lopex's financial ad unit, St. James Communications. The Alliance moniker now applies to 20 ad agencies worldwide that comprise the agency holding company, Alliance International. That company itself is controlled by Lopex PLC, London.

■ **Accounts**

Gained: Gateway supermarkets, Lucas (auto parts), Woolwich Building Society (financial svcs), Baxters (soups), British Telecom (intl call promo).

Lost: Falcon Holidays.

■ **Officers**

John Castle, ceo; Pip Kirby, exec vp; Alison Lewis, contact.

■ **Headquarters**

Alliance International UK
63-66 St. Martin's Lane
London WC2N 4JX
Phone: 441 836-0281
Fax: 441 240-7612

RANK: 57

Ally & Gargano

New York
Gross income: **$37.0** million

■ **Income & volume** ($ in millions)

Worldwide	1989	1988	% chg
Gross income	37.0	34.4	7.6
Volume	316.0	295.2	7.0
U.S.			
Gross income	37.0	34.4	7.6
Volume	316.0	295.2	7.0

■ **Workforce & facilities**

Worldwide	1989	1988	% chg
Employees	230	220	4.5
Offices	2	2	0.0

■ **Annual review**

Billings are expected to expand from the 7% growth in 1989 to a projected 10% to 15% in 1990 stemming from the full impact of the newly acquired $25 million Shearson Lehman Hutton account, the consolidating of Tambrands business at A&G (it gained the $15 million Tampax brand) and $12 million in new products from Weight Watchers. Lorillard, Jergens and Pfizer also added to the $15 million billings increase from existing business, offsetting $20 million in lost business. In December, 1988, MCA sold 50% of this agency, and operating control, to Wesray Capital Corp. for $30 million, resulting in a reshuffling of personnel. In May, Bill Bishop resigned as president to chair a small healthcare agency. Warren Dechter was promoted to president-ceo from exec vp-client svcs, and relinquished the ceo title to William N. Luceno when he was hired from Wells, Rich, Greene where he had been president. Nancy Vaughan was named exec vp-group creative director to strengthen A&G's ability to address the women's market. The agency's focus shifted to packaged goods.

■ **U.S. accounts**

Gained: Shearson Lehman Hutton, Tambrands Inc.'s Tampax brand, Heinz's Weight Watchers (new prod), Jergens' Actibath, Pfizer (new prods).

Lost: Waldenbooks.

■ **Officers**

William Luceno, ceo; Amil Gargano, chmn; Warren Dechter, president; Michael Tesch, exec vp-dir creative svcs; Nancy Vaughan, exec vp-group creative head; Dawn Sibley, exec vp-dir media svcs.

■ **Headquarters**

Ally & Gargano
805 Third Ave.
New York, N.Y. 10022
Phone: (212) 688-5300
Fax: (212) 418-6875

RANK: 54

ALmap/BBDO

Sao Paulo
Gross income: **$38.0** million

■ **Income & volume** ($ in millions)

Worldwide	1989	1988	% chg
Gross income	38.0	NA	NA
Volume	144.1	NA	NA

■ **Workforce & facilities**

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	3	NA	NA

■ **Annual review**

This 20%-owned BBDO unit, fully named Alcantara Machado, Periscinoto/BBDO, gained Visa, Epilady and two chemical clients, among others. Billings show a dramatic increase, although year-to-year comparisons are rendered meaningless because of inflation ranging from 40% to 70% per month in 1989. ALmap operates three offices.

■ **Accounts**

Gained: Bradesco Seguros Insurance, Protecno (Epilady), Pfizer drugs, Petroquisa chemicals, Petrofertil chemicals, Visa.

■ **Officers**

Alex Periscinoto, managing dir-creative dir; Nelson dos Santos Ortega, adm/financial vp.

■ **Headquarters**

Almap/BBDO
Avenida Paulista 688, 01310 Piso 14
Sao Paulo, SP, Brazil
Phone: 55 11 289-1122
Fax: 55 11 251 1118

RANK: 81

ARC Advertising

London
Gross income: **$21.6** million

■ **Income & volume** ($ in millions)

Worldwide	1989	1988	% chg
Gross income	21.6	13.8	56.3
Volume	144.0	92.1	56.3

■ **Workforce & facilities**

Worldwide	1989	1988	% chg
Employees	127	92	38.0
Offices	1	1	0.0

■ **Annual review**

Three subsidiary start-ups involving direct marketing, business-to-business and

Reader's guide to agency profiles

Glossary to information in this report

RANK: 18

International Inseparable Agency

New York
Gross income: **$100.0** million

■ **Income & volume** ($ in millions)

Worldwide	1989	1988	% chg
Gross income	100.0	75.0	33.3
Volume	667.0	500.3	33.3

■ **Income & volume**

U.S.			
Gross income	50.0	40.0	25.0
Volume	333.5	266.8	25.0

■ **Workforce & facilities**

Worldwide	1989	1988	% chg
Employees	3,000	2,500	20.0
Offices	50	45	11.1

■ **Office billings in 1989** ($ in millions)

U.S. offices, location	Billings
IIA, New York	283.5
IIA, Houston	12.0
IIA, Detroit	25.0
IIA, Orlando, Fla.	3.0
Non-U.S. offices, location	**Billings**
IIA & others, Milan(MJ)	333.5
IIA Spain, Madrid(MN)	15.0
IIA AG, Hamburg(JV)	25.0

■ **International Inseparable Agency**, headquartered in New York, answered a questionnaire received from *Ad Age* in late December. But if the editors had not heard from IIA by January, a second form was sent. If IIA still had not responded and had gross income greater than $16.0 million in the prior year, the agency was contacted for a response.

■ **Income:** IIA and other agencies are ranked by worldwide gross income, which gives a better indication of size than volume (billings). Gross income is generally the sum of three sources: A percentage markup (15% or less) from media buys; a 17.35% markup for materials and services billed to the client; and the fee charged to the client.

■ **Volume:** Volume (short for capitalized billings) is the sum of three types of agency activity: Total commissionable billings for ad space and time; gross billings to clients for materials like artwork, research, etc., when supplied or performed by organizations other than the agency; and capitalized fees. Fees are capitalized by multiplying fees by 6.67. This makes fee income equivalent to billings by treating the fee as if it were a media commission. The 6.67 multiplier is the quotient of 100 divided by 15 (the media commission).

■ **Workforce & facilities:** This is IIA's total number of employees and offices worldwide, including all subsidiaries.

■ **U.S. office billings in 1989:** IIA broke out billings for each major U.S. office, or these billings were estimated by *Ad Age* and the agency was called for comment. Subsidiary offices are included if the subsidiary's billings are included in the parent's total. Service offices are not included.

■ **Non-U.S. office billings in 1989:** Non-U.S. billings and gross income were obtained by questionnaire. Throughout this report, agency affiliations with large multinational agency networks are noted by the following symbols:

(MJ) majority ownership by the multinational
(MN) minority ownership by the multinational
(ND) equity ownership not disclosed
(NA) equity not available
(NE) a non-equity affiliation
(JV) a 50%/50% joint venture

printing and publishing operations, and major new accounts won by the main agency in 1989 should effect a billings growth of 25% in 1990. The agency, whose staff increased by 38%, has recorded at least 30% growth in billings each of its past three fiscal reporting periods. Management at ARC recently bought back the agency from Grey Advertising.

■ Accounts

Gained: Jeyes Hygiene (industrial cleaners), Whitehall (additional brands), Norsk Data, *TV Guide*, Nutrition Direct, Blackpool Resort, Argus Newspaper Group, Sky Channel, Phoenix Foods (corporate), BAT (Cortina cigarette in Europe), Thorn Lighting, Birds Eye Wall's, Trusthouse Forte Catering, Griffin Factors (Midland Bank).

Lost: Plasplugs, Royal National Institute for the Blind.

■ Officers

Peter Steadman, ceo; John Goldsmith, chmn; Tony Holman, vice chmn; Graeme Robertson, head of A/C; Paul Brown, media dir; Ray Hearder, Ian Scott, creative dirs; Sharon Skeggs, new business dir; Malcolm Hunter, planning dir; Bharat Khaneka, finance dir.

■ Headquarters

ARC Advertising
195 Euston Road
London NW1 2BN U.K.
Phone: 441-387 7707
Fax: 441-388-3585

RANK: 35

Asahi Advertising

Tokyo
Gross income: **$82.9** million

■ Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	82.9	70.7	17.3
Volume	509.4	440.3	15.7

■ Workforce & facilities

Worldwide	1989	1988	% chg
Employees	787	790	(0.4)
Offices	27	27	0.0

■ Annual review

The agency, with 27 offices in Japan, experienced 15.7% billings growth in 1989, down from a nearly 30% increase in 1988 over the prior year. Asahi anticipates a similar 17% growth in 1990. Asahi also operates a public relations unit, Asako PR, and creative unit, Creative A, in Tokyo.

■ Accounts

Gained: None

Lost: None

■ Officers

Tokushiro Misawa, president-ceo; Noriatsu Ichimura, sr managing dir; Hiroshi Miyazawa, sr managing dir; Hideyuki Hashimoto, managing dir; Akira Mamine, managing dir; Michio Echizen, dir-intl.

■ Headquarters

Asahi Advertising Inc.
2-16, Kyobashi 3-chome
Chuo-ku, Tokyo 104, Japan
Phone: 813-272-6763
Fax: 813-272-7349

RANK: 30

Asatsu Inc.

Tokyo
Gross income: **$113.9** million

■ Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	113.9	102.7	10.8
Volume	837.3	740.4	13.1

■ Workforce & facilities

Worldwide	1989	1988	% chg
Employees	1,000	860	16.3
Offices	15	15	0.0

■ Annual review

Asatsu, posting a 13.1% growth in billings in 1989, expects a similar gain in 1990 based on continued worldwide expansion and a favorable economic climate for advertising due in part to the Japanese government's emphasis on local business growth. A Frankfurt, Germany, office was founded in 1989, the agency bought CAM Associates Pte. in Singapore and acquired major equity in Thai Image, Thailand.

■ Accounts

Gained: Pfizer Oral Care (Plax); Rothmans Marubeni Tobacco Corp. (Craven, Vogue); Socie World; NEC Home Electronics.

■ Officers

Masao Inagaki, ceo-president; Kenichi Ishihara, Ichiro Ohta, Hiroshi Shimizu, sr managing dirs; Yoshihide Sano, Tsutomu Takeda, managing dirs-account svcs; Tokuya Kama, managing dir-finance; Isao Sekiya, managing dir-media; Masatsugu Tsuji, managing dir-admin; Tsuneo Nakamura, dir-intl.

■ Headquarters

Asatsu Inc.
1-9-6, Shimbashi
Minato-ku, Tokyo 105 Japan
Phone: 813-575-3111
Fax: 813-572-2428

RANK: 77

Austin Knight

London
Gross income: **$23.0** million

■ Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	23.0	19.1	20.4
Volume	153.6	127.6	20.4

■ Workforce & facilities

Worldwide	1989	1988	% chg
Employees	395	387	2.1
Offices	NA	NA	NA

■ Annual review

Numerous account gains at Austin Knight, Britain's largest recruitment agency, helped boost billings 20.4% in 1989. The agency has 10 shops in the U.K., six in the U.S., three in Australia, two in Canada and one each in France and the Netherlands.

■ Accounts

Gained: Milk Marketing Board, Kentucky Fried Chicken, Anglian Water, BBC.

■ Officers

Ken Fordham, group chmn. Execs—M.J. Goodwin, T.C. Mallott, M.E. Ray, R.J. Ratcliffe, A.T. Knight, M.T.A. Purvis.

■ Headquarters

Austin Knight
Knightway House, 20 Soho Square
London, W1A 1DS, England
Phone: 441 437 9261
Fax: 441 439 3410

RANK: 18

N W Ayer

New York
Gross income: **$210.5** million

■ Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	210.5	185.2	13.6
Volume	1,398.2	1,347.7	3.7

■ Workforce & facilities

U.S.			
Gross income	128.8	127.8	0.8
Volume	859.1	946.7	(9.3)

■ Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

■ Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Zwiren, Collins, Karo, Trusk & Ayer, Chicago	41.8
N W Ayer, Dallas	58.1
N W Ayer, Detroit	43.9
N W Ayer, Houston	45.8
N W Ayer, Los Angeles	37.5
N W Ayer, New York	632.0

Non-U.S. offices, location	Billings
Affaersinformation, Stockholm(NE)	3.1
Ayer Nederland, Deventer, Netherlands(MJ)	16.4
Ayer New Zealand, Auckland(MJ)	7.1
Ayer Portugal, Lisbon	1.9
Ayer Vasquez, Buenos Aires(MN)	4.1
Ayer Great Britain, London(MJ)	62.5
Eastern Ad Co., Seoul(NE)	8.6
FLZ & Ayer, Petaling Jaya, Malaysia(MN)	2.5
J&C Advertising Oy, Helsinki(NE)	2.1
Leo Davis Ayer, Hong Kong(MJ)	9.1
MGTB Ayer, Paris(MN)	120.7
NWA Ltd., London	3.8
Publimerca, Guatemala City(NE)	1.6
Publintor Ayer, Milan(MJ)	66.6
TAPSA Ayer, Madrid(MJ)	148.8
TAPSA/N W Ayer, Madrid(MJ)	198.8
Wilkens Ayer, Hamburg(MJ)	135.7

■ Annual review

Ayer, which moved to new headquarters in New York's Worldwide Plaza, could not stem the tide of account losses which rolled over the agency in 1989. The $150-$200 million Burger King business was the biggest national defection. New York execs were sent in to shore up the Chicago office which lost key accounts—regional Burger King business ($25 million), Illinois Bell ($15 million), Deere & Co. ($8-$10 million), Citicorp Savings of Illinois ($5 million) and Outboard Marine Corp., which pulled back on consumer advertising and consolidated trade advertising elsewhere. The Chicago office then was merged with Zwiren, Collins, Karo, Trusk, a local shop which Ayer bought in late 1989. Other losses included Sterling Drug's Neo-Synephrine ($3.7 million), although the agency retained Sterling's Phillip's Milk of Magnesia, Haley's M-O and Phisoderm. The Avon Products account also went in-house. In early 1990 its Houston office lost the Continental Airlines account ($45-$50 million). These losses were somewhat offset by $145 million account gains in pan-European billings from Gillette, Beiersdorf AG's Cosmed division and SEAT, the Spanish division of VW, as well as Procter & Gamble's domestic consolidation of Folgers coffee account ($45 million) at Ayer. Midyear, the agency acquired 40% of Canada's Spectrum Group which owns McKim Advertising, Toronto, an estimated $150 million shop. Earlier, it pulled out of Australia by selling back its 49% equity in Connaghan & May Ayer but continued as an international associate. In December it agreed to acquire 100% ownership of Ayer Barker, its London-based affiliate, in exchange for Ayer's 12.7% stake in parent Charles Barker PLC. Also, it formed a joint venture with World International Network, a TV production company, to develop, produce and distribute programming via "member" broadcast channels reaching 106 countries. In early 1990, the pr unit was reorganized and renamed Wayland Associates after agency founder F. Wayland Ayer. Louis T. Hagopian, 29-year-agency veteran, retired as chairman and was succeeded by Jerry J. Siano. Thomas Maxey, president-international, was named vice chairman responsible for all worldwide offices except New York and Detroit. Charles Decker, former president of Mediatech-East, was named director of worldwide business development, a new post.

■ U.S. accounts

Gained: C.R. *Eggs* (low cholesterol eggs), Scandinavian Airlines, *Chicago Sun-Times*, Delta Dental, Medical Communications Services, *Outside Magazine*.

Lost: Avon Products, Burger King, Citicorp Savings of Illinois, Deere & Co., Honeywell Inc., Illinois Bell Telephone, Outboard Marine, Neo-Synephrine, *TV Guide*.

■ International accounts

Gained: Montana/Monteil (Groupe Beecham); Beiersdorf Cosmed div; Ryobi, Marlin Gerin.

Lost: Avon Products, Burger King, Copper Development Assn., DuPont, General Motors.

■ Officers

Jerry J. Siano, president-ceo; Thomas F. Maxey, vice chmn. Exec vps—Patrick Cunningham, cco; Dominick F. Rossi Jr., president, Ayer New York; Stanley B. Mattison, president, Ayer International; Charles W. Meding, managing dir-national opers; Warren E. Albright, dir-New York; James M. Anderson, president-ceo, McKim Advertising, Canada. Dirs-Ayer, New York: David Gantman, Keith B. Gould, Arthur W. Meranus, Fred I. Posner, John F. Walsh; Jerry N. Jordan, fin-adm, New York; Fernando Ocana, president-ceo, Tapsa Ayer, Spain; Theodore M. Regan Jr., managing cr dir-Ayer International; Marcella Rosen, dir-domestic offices.

■ Headquarters

N W Ayer
Worldwide Plaza, 825 Eighth Ave.
New York, N.Y. 10019
Phone: (212) 474-5000
Fax: (212) 474-5400

RANK: 4

Backer Spielvogel Bates Worldwide

New York
Gross income: **$759.8** million

■ Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	759.8	689.8	10.2
Volume	5,143.2	4,677.9	9.9
U.S.			
Gross income	310.7	282.7	9.9
Volume	2,158.0	1,964.2	9.9

■ Workforce & facilities

Worldwide	1989	1988	% chg
Employees	6,975	6,739	3.5
Offices	140	140	0.0

■ Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Backer Spielvogel Bates Worldwide, New York	1,181.3
Campbell-Mithun-Esty, Chicago	161.8
Campbell-Mithun-Esty, Detroit	177.0
Campbell-Mithun-Esty, Minneapolis	321.2
Campbell-Mithun-Esty, New York	199.8
Kobs & Draft, Chicago	44.3
Kobs & Draft, New York	72.7
Kobs & Draft, San Francisco	NA

Non-U.S. offices, location	Billings
Arellano/Ted Bates, Mexico City(MN)	18.6
Backer Spielvogel Bates Canada, Toronto(MJ)	104.2
Backer Spielvogel Bates, Hong Kong(MJ)	43.4
Backer Spielvogel Bates, Singapore(MJ)	7.8
BSB Athens Advertising, Athens(MJ)	11.1
BSB Batesgruppen Norway, Oslo(MJ)	140.6
BSB Beem, Lisbon(MJ)	18.1
BSB Brussels, Brussels(MJ)	98.0
BSB Deutschland Holding, Frankfurt(MJ)	210.0
BSB Dorland, London(MJ)	530.4
BSB Finnad Advertising, Helsinki(MJ)	84.5
BSB France, Paris(MJ)	89.3
BSB Ghersy Quintero, Caracas(NE)	7.4
BSB Italia, Milan(MJ)	73.6
BSB Japan, Tokyo(MN)	38.0
BSB Sweden, Stockholm(MJ)	93.0
BSB Taiwan, Taipei(MJ)	4.3
BSB Thailand, Bangkok(MJ)	1.2
BSB Thailand, Bangkok	NA
BSB (Malaysia), Kuala Lumpur, Malaysia(MN)	18.1
BSB/Gubbins, Lambiasi, Santiago	3.7
BSB/Meza, Bogota(NE)	8.0
Diamond Ad, Seoul(MN)	69.6
Dr. Puttner & Ted Bates, Vienna(MJ)	28.5
George Patterson Pty., Sydney(MJ)	512.2
Grupo BSB, Madrid(MJ)	252.8
Hunter Advertising, Dublin(MJ)	16.1
Insight Communications, Lagos, Nigeria(NE)	0.0
Norgard Mikkelsen Reklamebureau, Denmark(MJ)	40.9
Perdomo-Ted Bates/Public, Lima(NE)	0.7
PT Bates Mulia Indonesia, Jakarta(NE)	7.0
Rota Advertising, Istanbul(NE)	4.5
Scholz & Friends, Hamburg(MJ)	130.0
Sista's Private, Bombay(NE)	8.5
Ted Bates Co., Amsterdam(MJ)	38.3
Ted Bates Holding, Copenhagen(MJ)	129.7
Ted Bates New Zealand, Wellington, N.Z.(MJ)	28.1
VIP Publicidad, Quito(NE)	1.4

■ Annual review

Worldwide billings were up 9.9%, as domestic and overseas businesses shared equally in the growth. In the U.S., $61 million in billings came both from new clients, including J.P. Morgan ($9 million) and Jhirmack ($14 million), and from existing accounts, including new products from Burroughs-Wellcome, Carter Wallace, North American Philips and Xerox. The agency retained CBS' media planning and buying account but lost the CBS entertainment division ($6 million). It suffered one of its biggest losses early this year when Prudential Insurance ($60 million) left after 20 years—a decline likely to cause some layoffs in the New York office. International expansion included the consolidation of the Fisher-Price pan-European account ($9.6 million) at BSB with Dorland as lead office. In early 1990 BSB bought four agencies in Norway and Sweden from Scan Partner. BSB Europe reached a deal in June, 1989, with Goskino, the Soviet state committee for cinematography, to train Soviets in developing TV commercials. During the year, Chairman-CEO Robert Holmen retired, William Backer became president-worldwide creative director, Robert H. Lenz became chairman-exec creative dir and Constantine "Dean" Scaros, president-managing director.

■ U.S. accounts

Gained: Kobacker Shoes, Webster Industries (Good Sense), Ohio State Fair, Playtex Family Products Corp. (Jhirmack brand), J.P. Morgan & Co.

■ International accounts

Gained: Mars Pedigree Petfoods—Dorland.

Lost: Shulton—Dorland.

■ Officers

Carl Spielvogel, chmn-ceo-Worldwide; William M. Backer, president-Worldwide exec creative dir; Alvin A. Achenbaum, vice chmn, professional svcs-Worldwide; Exec vps worldwide—John N. Citron, finance & admin; Anne Melanson, dir human resources; Kenneth R. Rogers, multinational managing dir-Worldwide; Jacqueline Silver, dir rsch svcs & strategic planning; Judy Torello, sr vp-dir corp communications-Worldwide. New York—Robert H. Lenz, chmn-exec creative dir; Constantine Scaros, president; Stephen M. Lei, vice chmn-dir media & admin svcs; Exec vps NY—Randolph Lindel, coo; Mel Epstein, finance & admin; Jay Schoenfeld, media dir; Dennis Zolnierzak, dir business devel; Charles Breen, Nicholas Gisonde, co-creative dirs. E. Michael Roche, general mgr, L.A.; Raymond S. Caruso, exec vp-genl mgr, Ohio.

■ Headquarters

Backer Spielvogel Bates Worldwide
The Chrysler Building
405 Lexington Ave.
New York, N.Y. 10174
Phone: (212) 297-7000
Fax: (212) 297-7007

RANK: 99

Baker Lovick Advertising

Toronto
Gross income: **$17.7** million

■ Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	17.7	16.3	8.7
Volume	118.4	108.9	8.7

■ Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	6	NA	NA

■ Annual review

Baker Lovick expects billings to grow about 8.5% in 1990, with the increase coming largely from Western Canada covered by its offices in Vancouver, Calgary, Edmonton and a Victoria office to start up this year. Returns in 1989 included those of Grant Tandy Ltd., which merged with BL in June 1989. In the merger, Grant Tandy's core accounts John Deere, Dun & Bradstreet and Merrell Dow Pharmaceuticals came on board. GT's Arby account ($700,000) was resigned due to conflict. Under the new ownership structure, Baker Lovick is owned 100% by Comcore/BBDO Inc., while Omnicom Group's BBDO Worldwide retains 49% equity of Baker Lovick.

■ Accounts

Gained: Bristol Laboratory (pharmaceuticals), Coal Producer's Assn, DOW Chemical, Executive House Hotel, Hoescht U.S. (farm chemicals), Hormel (meat), Interlink Systems (specialty video systems—buses), O'Donal's Restaurant, Real Estate Board of Vancouver, Rogers Entertainment (cable svcs), VTech (electronics), Western Industrial Clay Products.

Lost: Arby's, Canadian Kenworth (trucks), Casabellow Wines, CNCP Telecommunications, Crowntek (custom computer svcs), Frito-Lay, Holiday Juice, Investor's (financial svcs), Lloyd's Bank, Paccar (auto parts), Parallam (wood prods), Taco Time (food), Theon Commerce (pharmaceuticals, cosmetics).

■ Officers

P.R. Mills, president-ceo. Exec VPs—G.D. Baston, secretary; B.V. Damast, national creative dir; M.L. Kingston, regional general mgr; D.M. Lamb, managing dir-B.C.; R.B. Ranson, chmn-Alberta; W.E. Robinson, A.C. Ross, P.E. Stringham, regional general mgrs.

■ Headquarters

Baker Lovick Advertising
60 Bloor St. West
Toronto, Ont. M4W 3B8 Canada
Phone: (416) 963-4487
Fax: (416) 963-8067

RANK: 82

Bartle Bogle Hegarty

London
Gross income: **$21.4** million

■ Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	21.4	19.0	12.8
Volume	159.2	126.7	25.7

■ Workforce & facilities

Worldwide	1989	1988	% chg
Employees	175	160	9.4
Offices	1	1	0.0

■ Annual review

After a 25.7% billings jump last year influenced by major account gains from Sony, Cadbury and Royal Bank of Scotland among others, the London agency predicts growth of 21% for 1990 based on the full effect of 1989 business gains and projected additional business.

■ Accounts

Gained: Sony, Brewers' Society, Spillers, PowerGen, Van den Berghs, Cadbury, Swinton Insurance, Showerings, Royal Bank of Scotland.

■ Officers

John Bartle, Nigel Bogle, joint ceos; John Hegarty, creative dir; Jerry Judge, chmn; Tim Lindsay, Simon Sherwood, joint managing dirs; Martin Smith, deputy chmn; Andrew Jackson, new business dir; Richard Eyre, media dir; Charlie Robertson, head of acct planning.

■ Headquarters

Bartle Bogle Hegarty Ltd.
24/27 Great Pulteney St.
London, W1R 3DB
Phone: 441 734 1677
Fax: 441 437 3666

RANK: 7

BBDO Worldwide

New York
Gross income: **$656.6** million

■ Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	656.6	585.9	12.1
Volume	4,550.0	4,051.2	12.3
U.S.			
Gross income	373.6	340.5	9.7
Volume	2,656.0	2,414.3	10.0

■ Workforce & facilities

Worldwide	1989	1988	% chg
Employees	5,520	5,497	0.4
Offices	222	203	9.4

■ Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Ammirati & Puris (50%), New York	110.0
Baxter, Gurian & Mazzei, Beverly Hills, Calif	26.0
BBDO Worldwide, Atlanta	145.9
BBDO Worldwide, Chicago	175.7
BBDO Worldwide, Los Angeles	141.2
BBDO Worldwide, Minneapolis	51.2
BBDO Worldwide, New York	604.7
BBDO Worldwide, Palo Alto, Calif	37.7
BBDO Worldwide, Southfield, Mich	174.4
Blair Advertising, Rochester, N.Y	20.2
Carravetta Allen Kimbrough, Miami	16.9
Frank J. Corbett Inc., Chicago	65.8
Doremus & Co., Boston	18.0
Doremus & Co., Chicago	7.0
Doremus & Co., Los Angeles	3.0
Doremus & Co., New York	120.0
Doremus & Co., San Francisco	NA
Lavey/Wolff/Swift, New York	107.7
Rapp Collins Marcoa, New York	113.0
Tracy-Locke, Atlanta	20.4
Tracy-Locke, Dallas	305.7
Tracy-Locke, Denver	NA
Tracy-Locke, Los Angeles	23.1
Tracy-Locke, New York	55.4
Tracy-Locke, Philadelphia	NA

Non-U.S. offices, location	Billings
AKT/BBDO Business, Helsinki(MN)	13.7
Alberto Garnier, San Jose(NE)	11.5
Almap/BBDO, Sao Paulo(MN)	144.1
Andina/BBDO, Guayaquil, Ecuador(NE)	2.2
Antena/BBDO, Lisbon(MN)	8.8
Anthonissen & Associates, Brussels(MJ)	1.6
Apex Publicidad, San Salvador(NE) -	3.0
ASGS/BBDO, Zurich(MN)	0.0
Alenas/BBDO, Bogota(NE)	11.4
Avance/BBDO Publicidad, Guatemala City(MN)	4.8
Baker Lovick, Toronto(MN)	118.4
BBDO Advertising, Singapore(MJ)	7.8
BBDO Business Communications, Copenhagen(MJ)	6.3
BBDO de Chile, Santiago(MN)	19.0
BBDO Espana, Barcelona(MJ)	183.3
BBDO Group Germany, Duesseldorf(MJ)	307.2
BBDO Hong Kong, Hong Kong(MJ)	30.9
BBDO Puerto Rico, Hato Rey, P.R.(MJ)	27.9
BBDO Retail Canada, Toronto(MJ)	11.9
BBDO, London(MJ)	52.7
BBDO Athens, Athens(MJ)	16.9
Clemenger/BBDO New Zealand, Auckland(MN)	82.6
Clemenger/BBDO, Melbourne(MN)	325.1
CLM/BBDO, Paris(MJ)	177.8
Comcare Direct, Toronto(MJ)	6.5
Contrapunto, Madrid(MN)	78.8
David Ratto/BBDO, Buenos Aires(MN)	31.2
Diesta/BBDO, Mexico City(MN)	10.9
Ehrenstrahle & Co., Stockholm(MJ)	18.9
FHV/BBDO Group, Amstelveen, Netherlands(MJ)	213.8
Henriksen & Sieling/BBDO, Copenhagen(MJ)	34.6
Hermosilla, Zegers, Santiago(MN)	5.8
HLR & Co./BBDO, Stockholm(MN)	29.0
Impact/BBDO International, Nicosia, Cyprus(MN)	26.1
Italia/BBDO, Milan(MN)	184.2
Jenssen & Borkenhagen /BBDO, Oslo(JV)	4.0
Jenssen & Borkenhagen /BBDO, Oslo(JV)	5.1
Jenssen & Borkenhagen/BBDO, Oslo(MN)	29.1
LG Ad, Seoul(NE)	160.7
Manhattan International, Karachi, Pakistan(NE)	2.0
Media Team, Brussels(MJ)	9.4
Moors Bronselaer, Brussels(MJ)	15.9
Morsel & Partners, Antwerp(MJ)	6.4
Nielsen, Mikkelsen & Duus, Copenhagen(MJ)	16.0
Obro, Gronholm & Bydal, Copenhagen(MJ)	4.3
Oy Avant/BBDO, Helsinki(MN)	2.4
PAC/BBDO Worldwide, Manila(MN)	9.3
Publicistas Venezolanos, Caracas(MN)	5.5
Rogelio Diaz Publicidad, Panama City	1.5
Rosabel Advertising, Lagos, Nigeria(NE)	2.9
R.K. Swamy/BBDO Advertising, Madras, India(NE)	20.1
Sorensen, Selig & Goldmann, Copenhagen(MJ)	4.1
Stentor/BBDO Advertising, Taipei(MJ)	19.1
Team/BBDO, Vienna(MJ)	26.3
VVL/BBDO, Brussels(MJ)	35.1
Wings/BBDO, Petaling Jaya, Malaysia(MJ)	9.4
Zeus Publicidad, Tegucigalpa, Honduras(MN)	3.1

■ Annual review

Worldwide expansion remained a priority at BBDO which named a new European board of directors in January 1989, to prepare for 1992. By November, a joint venture in the Soviet Union was being planned with West German publishing giant Burda and Soviet government agency Vneshtorgizdat. In between, BBDO bought a minority stake in Jenssen & Borkenhagen, Oslo; bought Gallardo Cordoba & Associates, San Juan, Puerto Rico; increased its minority equity in Stentor/BBDO, Taipei, to a majority; and signed non-equity affiliation agreements with shops in Ireland (Dublin) and Pakistan. Major account gains at BBDO-named shops included Hellmann's and Best Foods mayonnaise brands ($20 million), additional business from Sara Lee Corp.'s European coffee and groceries unit ($30 million) and Federal Express international ($20 million). These gains outweighed losses of Lorillard's Kent brand ($10 million), Lever Bros.' Wisk ($13 million) and Alamo Rent A Car ($5 million) to help BBDO post consolidated billings growth of 12.3%. Norman Campbell retired as chairman-ceo of BBDO Worldwide and was succeeded by Allen Rosenshine. Separately, Arthur Sturgess was named to new post of president at BBDO Asia-Pacific, while Willi Schalk resigned as president-ceo BBDO Worldwide and Carl Casselman took the new post of senior vp-senior creative director in New York. Carmichael-Lynch in Minneapolis bought subsidiary Doremus & Co.'s Kansas City office, and subsidiary Tracy-Locke's LA office suffered the loss of the $75 million Taco Bell account. T-L's Phil Slott, chairman-chief creative officer, retired.

■ U.S. accounts

Gained: Chicago—Central Telephone, Telephone Company Services; New York—Best Foods (Skippy Peanut Butter, Mueller's Children's Pasta), Converse, Federal Express Intl; Minneapolis—Twin Cities Television Coalition, Surdyk's Liquor, Federal Express; Atlanta—Ryland Homes, South Florida Dodge Dealers; LA/SF—Pizza Hut, Glendale Federal Savings, Pioneer.

Lost: Chicago—Mindscape, Affiliated Banc Group; New York—Lever (Wisk), Lorillard (Kent), Chrysler First, Converse; Atlanta—Alamo Rent A Car, Portman Berry Companies; LA/SF—Claris, Bumble Bee, Fisher.

■ International accounts

Gained: Seagram—Argentina, Hong Kong, Netherlands, Spain; Sara Lee—Australia, Belgium, France, Germany, Malaysia, Netherlands, Singapore; Schwarzkopf—Australia, Austria, Germany, Netherlands; Ralston Energy Systems—Austria, Belgium, France, Italy, Spain, Switzerland; DMV-Campina—Belgium, El Salvador, Germany, Greece, Hong Kong, Middle East, Netherlands; S.C. Johnson—Greece, Middle East, New Zealand; Sopral/Rowntree—Greece; Polaroid—Portugal.

Lost: Mexx—Austria; Agfa—Belgium; Johnson & Johnson—Belgium; Hasbro—Hong Kong; Wrigley—Netherlands.

■ Officers

BBDO Worldwide: Allen Rosenshine, chmn-ceo; Philip B. Dusenberry, vice chmn; J. Thomas Clark, vice chmn-chmn BBDO N. America; James Cannon, exec vp-cfo; Bruce Macdonald, exec vp; Lewis Pringle, exec vp-chmn Europe, Mid-East, Africa; Eduardo Vargas, exec vp-chmn Latin America; Arthur Sturgess, chmn Asia-Pacific; Andrew Donchak, sr vp; Barry Wagner, secretary. BBDO Atlanta—Donald C. Mitchum, president-ceo. BBDO Chicago—Eric Harkna, president-ceo; Roger Mohr, chmn. BBDO Detroit—W.R. Kelly, ceo-president. BBDO LA/SF—Gene Cameron, ceo-president. BBDO Minneapolis—Jon Firestone, president-ceo. BBDO New York—Philip B. Dusenberry, chmn-ceo; Gary de Paolo, exec vp-managing dir.

■ Headquarters

BBDO Worldwide
1285 Ave. of the Americas
New York, N.Y. 10019
Phone: (212) 459-5000
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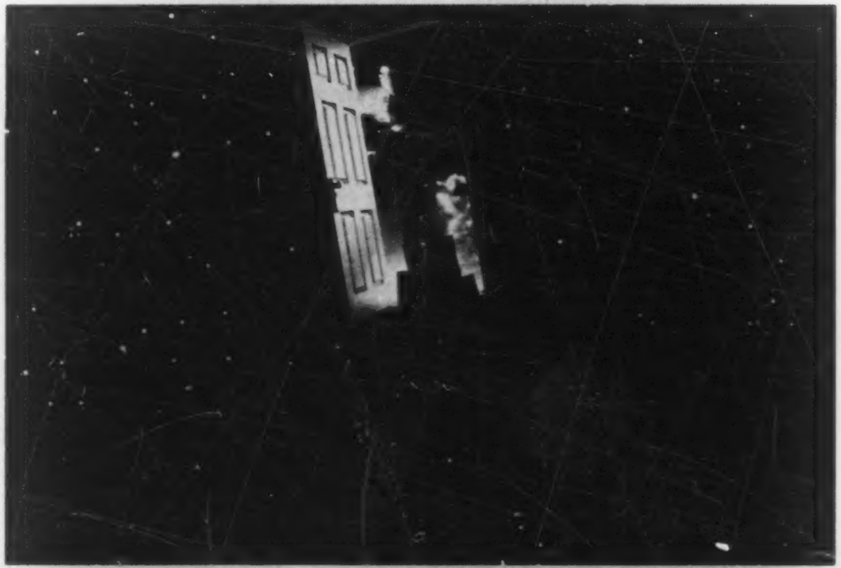

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Weaving tangled webs

Lopex PLC is a "double" holding company through its majority ownership of another holding company, Alliance International, that manages a network of 20 advertising agencies. Buoyed by mergers and strong European markets—the source of most of its business—Alliance increased billings by 25.2% to $835 million. Of the 20 agencies in Alliance, only four are less than 50% owned by the network. In the ownership structure of Alliance, 17 agencies own one share (one per country), while Lopex owns one share per country, plus one. Directors of Alliance are the CEO's of each agency (one for each country). Aside from advertising, Lopex drew $505 million, up 30%, from its "communication" side that includes M.E.A.L., the U.K.'s media-monitoring

RANK: 36

BDDP Paris

Paris
Gross income: **$79.2** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	79 2	69 3	14 2
Volume	527 9	462 5	14 2

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

Office billings in 1989 ($ in millions)

Non-U.S. offices, location	Billings
ALS/BDDP, Toulouse(MJ)	NA
?ambou/BDDP, La Reunion(MJ)	NA
Caiman/BDDP, Strasbourg(MJ)	NA
Horizons Media, Paris(MN)	NA
Jump/BDDP, Lyon(MJ)	NA
Nickel/BDDP, Lille(MJ)	NA
Nouvelle Vague, Nantes(MJ)	NA
Opera, Paris(MJ)	NA
Grand Bleu/BDDP, Marseille(MJ)	NA
Tonic/BDDP, Bordeaux(MJ)	NA
Vibrations/BD[illegible]tpelier(MJ)	NA

Annual review

Billings increased 14.2% in 1989 as a new-business drive succeeded in pulling in eight new accounts. Two were Europewide (Polaroid film and Reckitt & Colman toiletries) and another was worldwide—TAG-Heuer (luxury sport watches). BDDP Paris is the lead agency of BDDP Group, a holding company which had $118.6 million in gross income and $791 million in billings in 1989. The agency received three Gold Lions for ads at the Cannes International Advertising Film Festival last year. Eric Tong Cuong replaced Jacques Levy as head of the Paris shop.

Accounts

Gained: France Loto (national lottery), Korean Air, Matra Telecommunications, Mc Cain (frozen food), Pier Import (furniture), Polaroid (conventional film and instant-Europe), Reckitt & Colman (toiletries-Europe), TAG-Heuer (luxury sport watches—worldwide).

Lost: Printemps (department store), Suze.

Officers

Jean-Claude Boulet, Jean-Marie Dru, Marie-Catherine Dupuy, Jean-Pierre Petit, co-founders/principals; Eric Tong Cuong, president; Jean-Yves Nollet, cfo; Nick Baum, managing dir-intl.

Headquarters

BDDP Paris
162-164 Rue de Billancourt
92103 Boulogne-Billancourt
France
Phone: 331-49-09-70-10
Fax: 331-49-09-72-32

RANK: 91

Bloom Cos.

Dallas
Gross income: **$20.0** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	20 0	22 1	(9 5)
Volume	168 2	182 6	(7 9)
U.S.			
Gross income	20 0	22 1	(9 5)
Volume	168 2	182 6	(7 9)

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	255	263	(3 0)
Offices	2	2	0 0

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Bloom Cos., Dallas	103 4
Bloom Cos., New York	64 8

Annual review

Bloom spent 1989 rebounding from its unsuccessful pitch for the $100 million Nissan Infiniti account, on which it finished second after resigning the $10 million Alfa Romeo account to gain the final round. It reported a drop of $14.4 million in billings that also included the departure of Sterling Optical ($5 million) and Pinkerton Tobacco, which consolidated its account at Buntin Advertising. The agency won and then lost the $4 million Grandy's Restaurants account. Gains included Deposit Guaranty Bank ($5 million) and New Zealand Marketing Development Board ($2 million). Bloom Public Relations, not included in the parent's total results, reported $9.4 million in billings, up 40.3%. In November, C. Anthony "Tony" Wainwright, president-coo, resigned after nine years and Robert Bloom assumed his titles and management responsibilities.

U.S. accounts

Gained: Grandy's Restaurants, Associated Importers' Suntory Beer, John Bull lager, Double Diamond Ale; Deposit Guaranty Bank/Team Bank; Ross Laboratories' Exceed, New Direction; Airwick's Magic Mushroom; Carnation's Buitoni pasta, Liggett Group NBA Hoop Cards.

Lost: Sterling Optical, Pinkerton Tobacco, Grandy's Restaurants.

Officers

Robert H. Bloom, chmn-president-ceo; Marion T. Flores, exec vp-cfo. Bloom Dallas: Paul MacMahon, chmn-ceo; Seth Werner, president. Bloom New York: Jeffrey I. Fine, chmn-coo; Penelope J. Hawkey, president. Bloom Public Relations: Brian Cummings, president.

Headquarters

Bloom Cos.
3500 Maple Ave.
Dallas, Texas 75219-0950
Phone: (214) 443-9900
Fax: (214) 443-0002

RANK: 19

Bozell Inc.

New York
Gross income: **$190.7** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	190 7	179 2	6 4
Volume	1,400 0	1,283 0	9 1
U.S.			
Gross income	155 4	150 3	3 4
Volume	1,165 0	1,090 0	6 9

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	2,243	2,172	3 3
Offices	60	59	1 7

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Bozell Inc., Atlanta	35 0
Bozell Inc., Chicago	84 0
Bozell Inc., Dallas	260 0
Bozell Inc., Detroit	180 0
Bozell Inc., Los Angeles	90 0
Bozell Inc., Minneapolis	45 0
Bozell Inc., New York	401 0
Bozell Inc., Omaha	30 0
Bozell Inc., Tampa	40 0

Non-U.S. offices, location	Billings
Arms Communications, New Delhi(NE)	2 2
Atlas Bozell, Manila(NE)	1 5
Bozell Advertising, Amstelveen, Netherlands(MJ)	8 1
Bozell Advertising, Singapore(MJ)	10 5
Bozell CCAA, Taipei(MN)	22 7
Bozell e Associati, Milan(MJ)	64 4
Bozell Espana, Madrid(MJ)	12 4
Bozell Meitsu, Tokyo(MN)	18 6
Bozell Palmer Bonner, Toronto(MJ)	13 4
Bozell Publicitas, Vienna(MN)	16 6
Bozell Rydge, Waverton, Australia(MJ)	8 8
Bozell Sousas Publicidade, Porto, Portugal(MJ)	5 8
Bozell S.A., Geneva(NE)	NA
Bozell S.A., Geneva(NE)	21 1
Bozell S.A., Mexico City(MN)	31 7
Bozell Werbeagentur, Frankfurt(MJ)	15 6
Bozell, Hong Kong(MJ)	23 5
Bozell, Petaling Jaya, Malaysia(MN)	8 2
Bozell/CPV Advertising, Santurce, P.R. (MJ)	6 6
Bozell/Svensk Reklamtjanst, Stockholm(NE)	1 2
Comark, Athens(MN)	1 9
Createam, Frederiksberg, Denmark(NE)	16 5
Grant Hellas, Athens(MN)	1 5
Hiba, Al Kuwait, Kuwait(MN)	1 8
J. Sanchez Asociados, Bogota(NE)	3 3
Kauppamainos Oy, Helsinki(NE)	22 1
Matari Inc., Jakarta(NE)	19 5
Minds Lanka, Colombo, Sri Lanka(MN)	0 4
Norton Publicidade, Sao Paulo(NE)	96 8
Orientations, Jeddah, Saudi Arabia(MN)	4 7
Prologo/Bozell, Santiago(NE)	2 7
Vepro Publicidad, Caracas(NE)	4 8

Annual review

Of the $128 million increase in billings, the U.S. claimed 75% of the growth because of major new business gains from new accounts, Long John Silver's ($30 million) and Pfizer ($25 million). International growth was credited to new account gains from Samsung, Holiday Inns and Rockwell International, a boost in its London equity investment from 20% to 40%, and the opening of new shops in Portugal and Taiwan in which it took 75% and 45% positions, respectively. Bozell is part of the Bozell, Jacobs, Kenyon & Eckhardt holding company. A 9%-10% growth is anticipated in 1990 based on anticipated account gains and continued increases from existing accounts. Forecasting more international investments and continued top management involvement in all operations, the agency made several personnel changes including promoting David Bell to president and making Birmingham, Mich., his principal office, close to Chrysler Corp. account. In early 1990, European operations were restructured with Roger Neill becoming chief executive of Bozell Europe and Winston Fletcher, chairman.

U.S. accounts

Gained: Long John Silver's, Pfizer Inc., SEGA of America Inc., Dial Corp: (household and laundry div), Tyco Inc. (Viewmaster), Samsung (consumer electronics), Glaxo, Mexico Tourism.

Lost: Case (ag products and construction equipment); Faberge/Elizabeth Arden, Squibb & Sons.

International accounts

Gained: Samsung—Portugal, U.K.; Holiday Inns—Belgium, Holland; Jacobs Suchard (Toblerone)—Hong Kong, Singapore; Totolotto (lottery)—Portugal; Rockwell—France, U.K.; Bergasol—Belgium, France; Alcatel—Spain; Fred Perry, Premier Brands—U.K.

Lost: San Pelligrino, Maggioni Winthrop—Italy; Instituto Mujer—Spain; New World Hotels—China, Hong Kong; Sanofi de Mexico—Mexico.

Officers

Charles Peebler, ceo; J. Liener Temerlin, chmn; Leo Arthur Kelmenson, chmn of exec committee; Joseph Caggiano, vice chmn-cfo; David Bell, president; Ronald DeLuca, vice chmn; Dennis D. McClain, president—Southwest; Ron Anderson, chief creative officer; Linda Robinson, president-RLL&M; Murray Smith, president-intl; Mike Drexler, Sid Marshall, exec vps; Rick Cooper, president-Midwest; Ken Gard, exec vp-treasurer.

Headquarters

Bozell Inc.
40 West 23rd St.
New York, N.Y. 10010
Phone: (212) 727-5000
Fax: (212) 645-9173

RANK: 51

Earle Palmer Brown Cos.

Bethesda, Md.
Gross income: **$40.1** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	40 1	36 2	10 8
Volume	310 5	271 1	14 5
U.S.			
Gross income	40 1	36 2	10 8
Volume	310 5	271 1	14 5

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	469	446	5 2
Offices	6	4	50 0

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Earle Palmer Brown, Atlanta	25 0
Earle Palmer Brown, Bethesda, Md	164 2
Earle Palmer Brown, New York	7 0
Earle Palmer Brown, Philadelphia	83 0
Earle Palmer Brown, Richmond, Va	20 3
Earle Palmer Brown, Tampa, Fla	11 0

Annual Review

A New York office, opened in March, and the January acquisition of Ensslin & Hall, Tampa, brought $18 million of the total $38.1 million in billings gained from new business. Major new accounts included Donnelley Directory-Mid Atlantic Yellow Pages ($10 million), TropWorld Casino & Entertainment Resort ($10 million) and CoreStates Bank ($8 million). Existing business added a slim $1.3 million, mostly from USAir due to its acquisition of Piedmont. Lost accounts totaled $16.7 million and included Freddie Mac ($3 million), Alt Robins Pharmaceuticals ($3 million) and LifeTouch Studios ($2 million). An $800,000 lawsuit filed by former owners of the Atlanta office, acquired in 1987, was settled out of court and EPB bought another Atlanta agency, Noble Liller Neal, to specialize in food advertising. A Miami office, reporting to Tampa, opened in October. Billings growth of 14.5% in 1989 will fall back to about 5% in 1990, according to the agency, citing the paring back of spending from some accounts and the loss this February of the $15-to-$20 million Roy Rogers account, which left when the restaurant was bought by Hardee's Food Systems.

U.S. Accounts

Gained: Donnelley Directories, National Satellite Paging, CoreStates Bank, TropWorld Casino, Gates Energy Products, Fantle's Drug Stores, Council for Solid Waste, *Philadelphia Daily News*, Amerigas, Atlanta Gas, Georgia Pacific, Scientific Atlanta, NTW, NDC, Group Health Associates, FFC, CoreEast Financial, Conrad Hotels, Group W Cable, Blair, *Town & Country*, Group Health Associates, Carl Zeizz Inc., Interbake Foods.

Lost: Freddie Mac, Hechinger's, New York Transit, Paramount Communications, LifeTouch Studios, Save the Children, Rich Food, Alt Robins Pharmaceuticals.

Officers

Jeb Brown, ceo; Gary Jonas, president-corp admin; Mark Goldstein, president-Washington; Lonny Strum, president-Philadelphia; Jane Naas, president-New York; Brad Armstrong, president-Richmond; Alf Nucifora, chmn-Southeast; Don Hofmann, president-Southeast; Bill Westbrook, chief creative officer.

Headquarters

Earle Palmer Brown Cos.
6935 Arlington Road
Bethesda, Md. 20814
Phone: (301) 657-6000
Fax: (301) 657-2590

RANK: 14

Leo Burnett Co.

Chicago
Gross income: **$483.8** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	483 8	428 4	12 9
Volume	3,245 5	2,865 1	13 3
U.S.			
Gross income	288 8	263 4	9 6
Volume	1,945 3	1,765 0	10 2

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	5,653	5,211	8.5
Offices	42	41	2.4

Office billings in 1989 ($ in millions)

Non-U.S. offices, location	Billings
AMA Leo Burnett, Cairo	1.5
Black Pencil, Paris(MJ)	13.8
Bordelais, Lemeunier/Leo Burnett, Paris(MJ)	74 2
Communica Publicidad S.A., Guatemala City(NE)	6 7
Enterprise Middle East, Athens/Beirut(MJ)	0 0
Hemisphere-Leo Burnett Co., Manila(MJ)	11 1
H&C Leo Burnett, Beirut(NE)	33.3
Leo Burnett Co., Athens(MJ)	19 9
Leo Burnett Co., Buenos Aires(MJ)	41.8
Leo Burnett Co., Kuala Lumpur, Malaysia(MN)	18.2
Leo Burnett Co., Madrid(MJ)	39.2
Leo Burnett Co., Mexico City(MJ)	33 1
Leo Burnett Co., Milan(MJ)	75 0
Leo Burnett Co., San Juan(MJ)	22 4
Leo Burnett Co., Santo Domingo(MJ)	4 0
Leo Burnett Co., Taipei(MJ)	22.0
Leo Burnett Co., Toronto(MJ)	88 6
Leo Burnett Ltd., Bangkok(MJ)	18 8
Leo Burnett Ltd., Hong Kong(MJ)	58.0
Leo Burnett Ltd., London(MJ)	200 9
Leo Burnett Ltd., Singapore(MJ)	19.2
Leo Burnett Ltd., Sydney(MJ)	77.7
Leo Burnett Publicidade, Sao Paulo(MJ)	40.0
Leo Burnett-Belgium, Brussels(MJ)	39 0
Leo Burnett-Chile, Santiago(MJ)	9.9
Leo Burnett-Colombia, Bogota(MJ)	14 0
Leo Burnett-Denmark, Copenhagen(MJ)	19 1
Leo Burnett-Kyodo Co., Tokyo(MJ)	143 0
Leo Burnett-New Zealand, Auckland(MJ)	9 3
Leo Burnett-Venezuela, Caracas(MJ)	25.0
Markom/Leo Burnett, Istanbul(MN)	6 2
Marsden, Hartmann & L.B. Werbeagentur AG, Zurich	27 3
Michael Conrad & Leo Burnett, Frankfurt(MJ)	155 6
Noordervliet & Winninghoff/L.B., Amsterdam(MJ)	56 8
Nordskar & Thorkildsen Leo Burnett, Oslo(MJ)	15 1
Publicidad Commercial, San Jose(MN)	1 4
Radius Advertising, Manama, Bahrain(NE)	8 3
Targets Advertising, Jeddah, Saudi Arabia(NE)	10 6

Annual review

Growth of 13.3% in worldwide billings gave Burnett its fifth year in a row of double-digit growth as it topped the $3 billion mark in 1989. Growth was attributed largely to additional assignments from existing clients. Hallmark awarded its $35-$40 million account to Burnett last year and Pillsbury consolidated its estimated $4.8 million line of bakery sweet goods account at Burnett as part of a strategy to bring Pillsbury Brands and Green Giant division under one agency. Noxell assigned its $7.9 million Noxzema Skin Care products line after previously awarding its shaving cream brand. Other big gains included $8.7 million Gordon's gin and $7.1 million White Horse scotch whiskey (to Burnett-Kyodo). Heaviest losses included the estimated $30 million Mars account in December (which it had just won the previous summer) and $25-$30 million 7 UP international account (when Pepsi-Cola consolidated worldwide advertising at BBDO). In July, three Procter & Gamble shops including Burnett discussed joint media-buying in Europe. Near yearend, the $70 million Madrid agency, Vitruvio, merged with Burnett. Burnett headquarters settled into a new 50-story office building in Chicago.

U.S. accounts

Gained: Black & Decker (Steamworks), First Brands (Premium Cling Wrap), Oldsmobile (owner loyalty), Heinz (9-Lives Kitten Dinners), Kellogg (Oatbake, Heartwise, Smart Start Cereal bars, Common Sense Oat Bran), Kraft (Crockery Spreadables), Maytag (new line of refrigerators), Noxell (Noxzema Shave Creme & Skin Care prods), Samsonite (light-weight suitcases and Ultravalet).

Lost: Harris Trust, Telacton.

Officers

Hall Adams Jr., chmn-ceo, Leo Burnett Co.; Henry J. Feeley Jr., chmn-ceo, Leo Burnett Worldwide Inc.; Richard B. Fizdale, president-cco, Leo Burnett Co.; John C. Kraft, vice chmn-admin and finance, Leo Burnett Co.; William Lynch Jr., chmn-ceo, Leo Burnett USA; John J. Smith, vice chmn-corp dir of creative svcs.

Headquarters

Leo Burnett Co.
35 W. Wacker Drive
Chicago, Ill. 60601
Phone: (312) 220-5959
Fax: (312) 220-3299

RANK: 85

CFP Alliance

Paris
Gross income: **$21.2** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	21 2	20 3	4 3
Volume	141 1	136 1	3 6

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

Annual review

Billings slowed to a 3.6% growth at this Alliance network agency which charted a 7.8% increase in the prior year. The agency is 30% owned by Lopex PLC through its ownership of the Alliance network (also a holding company). In addition to the main Paris office of CFP, returns also include subsidiary shops: Rotation (sales promo), J. Larue (direct marketing), Consensus (recruitment) and Corolle (pr). All are located in Paris. CFP ownership varies from 60% to 100% of these shops.

Accounts

Gained: Allied Lyons' Tetley Tea, Institut Geographique, FINA (fuel), Lucas Automotive (accessories), Lifetime/Axa/GDE (residences).

Lost: Canard Duchene champagne.

Officers

Yves Crehalet, chmn; Jean-Michel Foliot, president; Annie Poussielgues, vp-creative dir.

Headquarters

CFP Alliance
61 Rue de Turenne
75003 Paris, France
Phone: 331 42 77 15 30
Fax: 331 42 77 76 20

RANK: 37

Cheil Communications

Seoul
Gross income: **$64.0** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	64 0	44 7	43 1
Volume	247 5	194 1	27 5

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	511	417	22 5
Offices	5	2	150 0

Annual review

Samsung Corp.-owned Cheil Communications, the leading South Korean agency in total billings, changed its name from Korea First Advertising in 1989, affiliated with Bozell Inc., New York, early in the year, and at yearend opened a joint venture in South Korea with Bozell called Cheil Bozell. Through this relationship, Bozell gained $20 million in worldwide Samsung business. In September, Cheil opened three liaison offices in New York, San Jose and London. Cheil expects a 14% increase in billings for 1990, a smaller percentage than its average growth since 1985 due to limited availability of space on Korea's TV CF and the recession in South Korea.

Accounts

Gained: Choong Wae Pharmaceutical, JCP Corp., Sharp Korea audio, Hanchang wireless phones.

Lost: Samyang Foods, Dong Kook Pharmaceutical, United Intl Pictures.

Officers: Cegill Shin, president; Hee-Joon Lee, sr managing dir; Chul-Ho Song, managing dir; Chang-Kue Shin, Jong-Seok Lee and Jae-Yong Bae, exec dirs; Jung-Tae Hwang, advisor.

Headquarters

Cheil Communications Inc.
108-2 Pyong-dong Chongno-gu
Seoul 110-102, South Korea
Phone: 822-730-9711/9
Fax: 822-739-5672

BDDP checked by Omnicom

Ever-hungry holding company BDDP had a billings hike of 58.5% in 1989 spurred by heavy agency consumption, but was rebuffed in its deal to buy Boase Massimi Pollitt, which was rescued in a buyout by friendly predator Omnicom. ☐

RANK: 24

Chiat/Day/Mojo

Venice, Calif.
Gross income: **$150.0** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	150.0	110.0	36.4
Volume	1,060.0	838.0	26.5
U.S.			
Gross income	106.0	77.0	37.7
Volume	785.0	603.5	30.1

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	1,368	1,204	13.6
Offices	17	17	0.0

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Anderson & Lembke, Stamford, Conn.	45.0
Chiat/Day/Mojo, Los Angeles	355.0
Chiat/Day/Mojo, New York	210.0
Chiat/Day/Mojo, San Francisco	140.0
Perkins/Butler, New York	35.0
Non-U.S. offices, location	**Billings**
Chiat/Day/Mojo, Auckland(MJ)	9.9
Chiat/Day/Mojo, London(MJ)	13.4
Chiat/Day/Mojo, Singapore(MJ)	9.3
Chiat/Day/Mojo, Sydney(MJ)	200.9
Chiat/Day/Mojo, Toronto(MJ)	35.0

Annual review

The billings mix got an infusion of $67.5 million from new accounts while existing accounts (almost exclusively Nissan) yielded growth of $129.1 million in billings to far outpace $15 million in lost business. This produced a domestic gain of 30.1% in billings. New accounts included Bissell Inc. ($15 million potential), American Express Gold Card ($25 million), New York Life Insurance ($30 million) and Eveready-Energizer ($25 million). Cutbacks from existing clients Drexel Burnham Lambert and Golden Grain added to the billings mix. During the year Reebok added its $15 million international account to the London office, but then in early 1990 put C/D/M's $40 million U.S. portion up for review. C/D/M initially resigned from the account but now may be back in the running. The agency, in folding newly acquired Mojo Advertising of Australia into its operations, merged Mojo's two U.S. offices in New York and San Francisco into C/D's shops there, eliminating 26% of Mojo USA/SF staffers. C/D/M plans to target European business, headed by the expanding London office (opened by Mojo in 1987), and to acquire a European-based agency in early 1990. In Australia, the Sydney office, which gained the $15 million Toyota account, dominates billings returns from the agency's five shops in Australia/New Zealand. Singapore, a branch office, remained the lone Asian shop after the Hong Kong agency was closed in 1989. Bob Wolf was named to chairman-ceo of North America so Jay Chiat, as chairman-ceo worldwide, can tend to international expansion. Tom McElligott moved in at yearend as exec vp-executive creative director, replacing Bill Hamilton, who left for O&M. The agency budgets billings growth for 1990 at 16%, but does not include projected billings from new business, which historically has affected overall annual growth of 30%.

U.S. accounts

Gained: Los Angeles—Dep hair products, Eveready-Energizer, Quaker State Corp. (Minit-Lube); San Francisco—3M Home Care Products, Oracle Software, Atari, Arenson, 3M Scotchgard, Esprit Corp.; New York—New York Life Insurance, American Express Gold Card, Bissell, Mr. Goodbuys.

Lost: Los Angeles—Eye Care Centers of America, Pizza Inn/Pantera Corp., Photo Go, Sunbeam Appliances; San Francisco—Dreyer's, Intel, Plus Development, Watermark, Plantronics, Park Lane Hotels, *Oakland Tribune*, Schlage; New York—Gaines, Ricoh, VeryFine Juices, Anne Klein II, Christian Dior, Grandy's.

International accounts

Gained: Robinsons, Air-O-Zone, Down to Earth, Labatts Brewery, S.C. Johnson Personal Products, Dell Computers (UK), Reebok Intl. (London), Glad Products, IKEA, Sheraton Wentworth, Toyota (Australia), Wellcome, Shell Autocare, Fountainhead Pty Ltd., Ray White Real Estate, Retec, Sealy of Australia, Sheraton Resort, Braun, Harrison & Crossfield, Metro Stores, SAFE Stores and Travel, North & South Magazine, Reckitt & Colman (New Zealand), Tums.

Lost: NSW Lotteries, Speedo, UOB Visa Card, Kresta Blinds, Reckitt & Colman (London).

Officers

Jay Chiat, chmn-ceo worldwide; Bob Wolf, chmn-ceo N. America; Lee Clow, president-chief creative dir.; Fred Goldberg, vice chmn-president-ceo SF; exec vps: Jane Newman, president-ceo NY; Bob Kuperman, president-ceo LA; Pete de Vaux, cfo; Allan Johnston, Alan Morris, joint-chmn, Australia-Pacific; Don Morris, chmn-ceo, Australia-Pacific.

Headquarters

Chiat/Day/Mojo Inc. Advertising
320 Hampton Drive
Venice, Calif. 90291
Phone: (213) 314-5000
Fax: (213) 396-1273

RANK: 42

Chuo Senko Advertising

Tokyo
Gross income: **$50.6** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	50.6	47.0	7.6
Volume	376.4	345.8	8.9

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	412	398	3.5
Offices	11	NA	(25.0)

Annual review

Billings, which grew 12.2% in yen in 1989, are expected to drop to a 10% increase in 1990. Business expansion of existing clients will provide most of the growth, says the agency. During 1989 the agency sold the remaining shares in its Malaysian agency, Chuo Senko (M) Sdn Bhd. The agency has three remaining subsidiaries outside Japan—Thailand (49% equity), Singapore (66%) and Hong Kong (100%)—and has seven Japanese branch offices aside from its headquarters in Tokyo.

Officers

Shoji Koshizawa, president; Yutaka Ohsawa, vp.

Headquarters

Chuo Senko Advertising Co. Ltd.
2-6-1, Ginza
Chuo-ku, Tokyo 104, Japan
Phone: 813 562-0151
Fax: 813 535-3576

RANK: 40

Clemenger/BBDO

Melbourne
Gross income: **$52.0** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	52.0	43.1	20.8
Volume	325.1	269.2	20.8

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	13	14	(7.1)

Annual review

Clemenger/BBDO, 46.5% owned by BBDO Worldwide, increased its billings 20.8% in 1989, down from nearly 33% growth in the prior year. Included in totals are Clemenger's percentage ownership in 13 offices throughout Australia, New Zealand and Tasmania.

Officers

P.G. Clemenger, chmn; H.J. Mackley, dir.

Headquarters

Clemenger/BBDO LTD
GPO Box 385D
Melbourne 3001, Australia
Phone: 613 269 4499
Fax: 613 820-1232

RANK: 52

Collett Dickenson Pearce

London
Gross income: **$39.1** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	39.1	31.9	22.5
Volume	269.6	216.1	24.7

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	248	245	1.2
Offices	10	14	(28.6)

Annual review

Heavy spending by Toyota ($13 million) and from the generic sugar account ($13 million) added to CDP's assignments, and the government's Water Privatisation Campaign ($38 million) helped elevate billings by a dramatic 24.7% in 1989. The agency set up an international media department, added four new countries to its network and opened offices in Lisbon, Barcelona and Milan. Billings are projected to increase 33% this year, three-quarters of that increase from organic growth and the remainder from new European partners. CDP subsidiary agencies and their percentage ownership are: Alice, France (50%), Canard, Italy (60%), Grupo Barro, Spain/Portugal (60%), RPM/Radar, Turkey (30%). CDP London also includes Travis Dale and CDP Financial.

Accounts

Gained: National Westminster, Johnnie Walker Black Label, Toyota, Generic Sugar Campaign, Water Privatisation—U.K.; Chico—Germany, France; Dole—Europe; Hertz—Denmark; Lancia—Portugal.

Lost: Land Rover, Scottish and Newcastle's Tartan Special.

Officers

John Salmon, chmn; Antonio de Laurentis, ceo-Italy; Fernando Nieto, ceo-Spain; David McLaren, ceo-UK; Michel Guerend, managing dir-intl; Stephen O'Brien, commercial dir UK; Richard Rivers, deputy managing dir; John O'Donnell, creative dir UK; Terry Alexander, media dir UK.

Headquarters

Collett Dickenson Pearce & Partners
110 Euston Road
London NW1 2DQ
Phone: 441 388-2424
Fax: 441 380-1217

RANK: 66

Cossette Communication-Marketing

Toronto
Gross income: **$28.3** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	28.3	21.0	34.5
Volume	180.7	136.6	32.2

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	490	350	40.0
Offices	4	4	0.0

Annual review

Cossette Communication-Marketing expects a 12% increase in billings in 1990 over last year. Returns include those of subsidiaries: Promotion Blitz, Optimum (pr), Grapheme (graphic design), Impact (market research), Geyser (trade name research), Societe Cossette Communication-Marketing and Cossette Communication-Marketing in Vancouver, all majority-owned.

Accounts

Gained: J. Pascal, Schering Canada, Canada Deposit Insurance, Chief Electoral Officer of Quebec, United Way, Ernst & Young.

Lost: Via Rail.

Officers: Claude Lessard, president-ceo; Francois Duffar, national exec vp; George E. Morin, exec vp, Montreal; Ian Saville, exec vp, Toronto; Richard Hadden, exec vp, Vancouver; Jean-Jacques Streliski, creative vp, Montreal; Peter Lanyon, creative vp, Toronto.

Headquarters

Cossette Communication-Marketing
437 Grande-Allee Est
Quebec City, Quebec G1R 2J5
Canada
Phone: (418) 647 4031
Fax: (418) 647 4031

RANK: 22

Dai-Ichi Kikaku

Tokyo
Gross income: **$155.8** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	155.8	141.9	9.8
Volume	1,053.0	977.7	7.7

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	758	683	11.0
Offices	11	11	0.0

Annual review

Dai-Ichi Kikaku this year expects its billings growth of 7.7% in 1989 to accelerate to near the 15% level. Europe is responsible for the higher expectations. The agency early this year sent staff to London and Duesseldorf in anticipation of establishing a European office. Dai-Ichi Kikaku billings include minor investments in Kresser, Craig/DIK of 33% and shops with U.S. agency associations: DIK Rapp & Collins Direct Marketing (66.8%), and DDB Needham DIK (Japan, Hong Kong, Singapore and Malaysia). It also owns 2% of I&S, another Top 100 agency. The agency also has investments in two U.S. agency holding companies—Omnicom and Mickelberry.

Accounts

Gained: Benetton Group, S.T. Dupont, Sato Seiyaku, Takeda Shokuhin Kogyo, 7-Eleven Japan.

Lost: None.

Officers

Top 25 U.S. cities by local shop billings

Rank	City	Total local shop billings 1989	1988	% chg	Reported shops	Top office in market by local billings	Local office billings 1989	1988	% chg
1	**New York**	$22,025.4	$19,493.6	13.0	164	**Saatchi & Saatchi Advertising**, New York	$1,527.1	$1,380.9	10.6
2	**Chicago**	6,293.6	5,664.8	11.1	78	**Leo Burnett Co.**, Chicago	1,945.3	1,765.0	10.2
3	**Los Angeles**	4,026.9	3,428.1	17.5	55	**Chiat/Day/Mojo**, Los Angeles	355.0	240.0	47.9
4	**Detroit**	3,457.6	3,210.9	7.7	27	**Lintas:Campbell-Ewald**, Warren, Mich.	667.4	598.6	11.5
5	**San Francisco**	1,635.7	1,471.4	11.2	33	**Foote, Cone & Belding**, San Francisco	325.4	297.6	9.3
6	**Minneapolis**	1,085.4	1,014.7	7.0	23	**Campbell-Mithun-Esty**, Minneapolis	321.2	299.0	7.4
7	**Dallas**	992.3	836.3	18.7	13	**Tracy-Locke**, Dallas	305.7	278.2	9.9
8	**Boston**	847.1	858.3	(1.3)	16	**Hill, Holliday, Connors, Cosmopulos**, Boston	293.1	287.4	2.0
9	**Atlanta**	726.2	657.7	10.4	24	**BBDO Worldwide**, Atlanta	145.9	120.5	21.0
10	**Cleveland**	697.0	629.7	10.7	15	**Nationwide Advertising Service**, Cleveland	206.8	185.4	11.5
11	**Philadelphia**	644.1	600.2	7.3	19	**Weightman Group**, Philadelphia	110.0	101.4	8.5
12	**St. Louis**	538.3	560.8	(4.0)	10	**D'Arcy Masius Benton & Bowles**, St. Louis	345.0	324.0	6.5
13	**Houston**	498.2	446.0	11.7	12	**Ogilvy & Mather Worldwide**, Houston	118.0	99.8	18.2
14	**Baltimore**	359.8	316.5	13.7	8	**W.B. Doner & Co.**, Baltimore	94.5	87.4	8.1
15	**Pittsburgh**	319.0	303.7	5.0	7	**Ketchum Communications**, Pittsburgh	111.9	109.4	2.2
16	**Milwaukee**	308.7	273.8	12.7	11	**Bader Rutter & Associates**, Brookfield, Wis.	54.1	50.3	7.6
17	**Washington**	285.1	291.9	(2.3)	6	**Earle Palmer Brown**, Bethesda, Md.	164.2	157.1	4.5
18	**Seattle**	249.3	192.7	29.4	8	**Cole & Weber**, Seattle	75.1	74.1	1.3
19	**Richmond, Va.**	229.4	190.1	20.7	6	**Martin Agency**, Richmond, Va.	140.5	113.0	24.4
20	**Columbus, Ohio**	197.4	179.8	9.8	8	**Fahlgren & Swink**, Columbus, Ohio	79.5	71.7	10.9
21	**Portland, Ore.**	188.9	146.4	29.0	6	**Weiden & Kennedy**, Portland, Ore.	98.0	62.0	58.1
22	**Rochester, N.Y.**	182.0	147.5	23.4	6	**Rumrill-Hoyt**, Rochester, N.Y.	86.6	75.6	14.6
23	**Kansas City, Mo.**	181.4	174.9	3.7	9	**Valentine Radford**, Kansas City, Mo.	79.4	70.3	12.9
24	**Stamford, Conn.**	179.9	158.5	13.5	6	**North Castle Partners**, Stamford, Conn.	62.1	50.4	23.2
25	**Akron, Ohio**	155.2	130.8	18.6	3	**Malone Advertising**, Akron, Ohio	76.4	70.0	9.0

Notes: Dollars are in millions. Prior year figures are for the same shops reporting in 1989.

Bunichiro Tanabe, chmn; Naoya Sakai, president-ceo; Exec vps—Makoto Hibino, Teruo Hiraki, Mitsuo Sadakata; Managing dirs—Hidetoshi Miyahara, Mitsuru Naota, Katsumi Kitazato, Yohji Hashimoto, Hironobu Itoh.

Headquarters

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2-2-3 Uchisaiwaicho, Chiyodaku
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RANK: 23

Daiko Advertising

Osaka, Japan
Gross income: **$152.1** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	152.1	139.7	8.9
Volume	1,214.1	1,126.7	7.8

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	34	NA	NA

Annual review

To prepare for further expansion of its international activities, Daiko Advertising established two overseas subsidiaries: Daiko-Communications Asia Co. Ltd. in Hong Kong, and Daiko Advertising USA in New York. In Japan, Daiko has an association with Grey Advertising through Grey Daiko Advertising, Japan, in which it owns 41%, and a joint venture with Foote, Cone & Belding, Daiko-FCB Impact Co. Ltd. The agency also has a non-equity partnership with Union Advertising of South Korea. An 11% increase in billings is forecasted for 1990.

Officers

Shojiro Nishio, president; Selichi Takada, Yoshiu Maegawa, sr managing dirs; Tokechi Adachi, Takechi Kawazoa, Fujio Okatani, managing dirs; Takashi Touchiya, Takashi Kawai, Takayochi Inoue, Takeo Okanishi, dirs.

Headquarters

Daiko Advertising Inc.
3-39, 4-chome, Miyahara, Yodogawa-ku
Osaka 532, Japan
Phone: 816-392-8111
Fax: 816-392-8004

RANK: 76

Dailey & Associates

Los Angeles
Gross income: **$23.3** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	23.3	19.6	18.4
Volume	155.2	131.0	18.4
U.S.			
Gross income	23.3	19.6	18.4
Volume	155.2	131.0	18.4

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	196	185	5.9
Offices	1	1	0.0

Annual review

Dailey's biggest account gain came in October when it won, as the incumbent, a four-year contract for the $50-$60 million California State Lottery, the nation's largest. Other big gains included the $6-$8 million Neutrogena Corp. shampoos, conditioner and new products from existing client, Carnation. Losses included the $5 million Teleflora, Los Angeles, account. Dailey is part of Interpublic.

U.S. accounts

Gained: Gallo's White Grenache Wine, Bartles & Jaymes wine cooler, Carnation's Friskies, Fresh Catch, Deluxe Ice Cream, Neutrogena, California State Lottery.

Lost: Teleflora, Transamerica Insurance.

Officers

Phillip Joanou, chmn-ceo; Clifford J. Einstein, president-creative dir; Brian Morris, exec vp-dir client svcs.

Headquarters

Dailey & Associates
3055 Wilshire Blvd.
Los Angeles, Calif. 90010
Phone: (213) 386-7823
Fax: (213) 380-6655

WCRS pegs future to media

WCRS believes clients want to unbundle their ad service, particularly moving media buying from agencies, which is why it unhinged its agency business for ownership of Carat International in 1989. ☐

RANK: 15

D'Arcy Masius Benton & Bowles

New York
Gross income: **$471.5** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	471.5	428.7	10.0
Volume	3,803.1	3,360.8	13.2
U.S.			
Gross income	232.3	209.6	10.8
Volume	2,055.3	1,794.2	14.6

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	5,534	5,532	0.0
Offices	93	85	9.4

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Clarion Marketing & Communications, New York	125.2
DMB&B, Bloomfield Hills, Mich.	407.9
DMB&B, Chicago	99.0
DMB&B, Los Angeles	167.3
DMB&B, New York	638.6
DMB&B, San Francisco	3.0
DMB&B, St. Louis	345.0
Manning Selvage & Lee, New York	135.7
Medicus Intercon International, New York	133.5

Non-U.S. offices, location	Billings
Danis-Benton & Bowles, Barcelona/Madrid(MJ)	93.0
DMB&B de Venezuela, Caracas(MN)	2.0
DMB&B Ergon, Athens(MJ)	5.5
DMB&B Lund & Lommer, Oslo(MJ)	26.3
DMB&B Modern, Hong Kong(MJ)	14.6
DMB&B, Amsterdam(MJ)	55.7
DMB&B, Auckland(MJ)	21.2
DMB&B, Bangkok(MN)	7.1
DMB&B, Brussels(MJ)	79.9
DMB&B, Copenhagen(MJ)	17.1
DMB&B, Dublin(MJ)	0.8
DMB&B, Duesseldorf/Frankfurt(MJ)	283.7
DMB&B, Helsinki(MJ)	13.2
DMB&B, Jeddah, Saudi Arabia(MJ)	0.3
DMB&B, Lisbon(MJ)	1.4
DMB&B, London(MJ)	514.3
DMB&B, Mexico City(MJ)	25.9
DMB&B, Milan/Rome(MJ)	136.7
DMB&B, Paris(MJ)	107.2
DMB&B, Singapore(MJ)	7.4
DMB&B, Stockholm(MJ)	33.0
DMB&B, Sydney(MJ)	126.7
DMB&B, Toronto(MJ)	74.9
DMB&B, Vienna(MJ)	14.3
DMB&B, Zurich(MJ)	8.1
Graffiti DMB&B, Buenos Aires(MN)	63.0
Ipsen & Parme, Copenhagen(MJ)	12.1
Medicus Intercon, Tokyo(MJ)	24.1
Medicus Intercon, (multiple cities)	205.8
Perwanal DMB&B, Jakarta(MN)	2.6
Tokyu Agency International, Tokyo(MN)	272.4

Annual review

The agency anticipates growth in 1990 to parallel 1989 results which grew 13.2% based on a net increase of $442.3 million in billings. The big growth in the billings mix came from new account wins, up $537.2 million, while existing clients increased their spending by $139.9 million. Some $234.8 million in accounts left the agency. Growth in 1989 was aided by acquisitions of U.S. operations, Penchina Selkowitz Inc., Connecticut Consulting Group and Ives & Associates, and Holko-Somerset in Australia. It formed 1675 Productions, an in-house production company, and in early 1990 created a publicity unit under its entertainment group. It bought a 49% stake in Sosa & Associates, San Antonio, which was awarded the Spanish-language ad and promotion portion of the $90 million Burger King account that D'Arcy won in 1989. In Europe, its U.K.-based, wholly-owned IMP unit launched in October IMP Europe, a network of 19 wholly-owned promotion companies. Result Management in the Netherlands also bought back 85% of its shares held by D'Arcy. Major new account wins included Maxwell House coffee ($50 million) and Gordon's Gin in Europe ($15-$20 million). In April, Kraft General Foods Group consolidated at D'Arcy network and cable TV buying ($300-$325 million). Due to major account losses on the West Coast, including Sun Diamond Growers of California ($12 million for Sun-Maid raisins and Sunsweet prunes), DMB&B sold its San Francisco office to DDB Needham Worldwidein February. In personnel changes, president Roy Bostock was named chief executive officer succeeding John S. Bowen who remained chairman while John Nieman was named U.S. executive creative director, the first such title in the agency's history. In April, John Ferries was named new president of the international division, succeeding Peter Redsell who retired.

U.S. accounts

Gained: IBM (Yellow Pages), Southwestern Bell Gateway Services, Pet Inc. (Old El Paso Mexican Foods, Accent, Underwood meat spreads, B&M Beans, Hain & Hollywood health foods, Pet-Ritz pie shells, Downey Flake waffles), Pittway Corp.'s Ademco div electronics.

Lost: Centel/Central Telephone, Hughes Aircraft.

International accounts

Gained: Anheuser Busch—Mexico; General Motors—Venezuela; Mars—Portugal, Mexico; Mobil—Australia; Nokia—Mexico; N.V. Philips—France, Germany, Italy, New Zealand, Norway, Portugal, Sweden; Procter & Gamble—Thailand; Rhone-Poulenc—New Zealand; Texaco—Belgium; United Distillers—Australia, Belgium, Denmark, Germany, Greece, Portugal, Spain.

Lost: Boots (OTC prods)—New Zealand; Hoover (household)—Belgium, France, UK; Kimberly-Clark—Denmark; Pernod—Denmark, UK.

Officers

John S. Bowen, chmn; Roy J. Bostock, president and ceo; Clayton Wilhite, president-USA div; John C. Ferries, president-intl div; George J. Simko, president-diversified div; Craig Brown, exec vp-cfo.

Headquarters

D'Arcy Masius Benton & Bowles
1675 Broadway
New York, N.Y. 10019-5809
Phone: (212) 468-3622
Fax: (212) 468-4385

RANK: 11

DDB Needham Worldwide

New York
Gross income: **$552.9** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	552.9	399.9	38.2
Volume	4,095.4	3,020.3	35.6
U.S.			
Gross income	302.9	244.4	24.0
Volume	2,386.3	1,929.3	23.7

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	5,951	4,697	26.7
Offices	110	91	20.9

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Ammirati & Puris (50%), New York	110.0
DDB Needham, Chicago	571.9
DDB Needham, Denver	25.8
DDB Needham, Detroit	80.6
DDB Needham, Los Angeles	136.3
DDB Needham, McLean, Va	33.0
DDB Needham, New York	542.9
DDB Needham, Rancho Cordova, Calif	27.7
DDB Needham, San Francisco	30.8
Elgin Syferd DDB Needham, Seattle	31.9
M/V/G DDB Needham, Honolulu	25.7
Bernard Hodes Group, New York	203.1
Kallir, Philips, Ross, New York	168.0
Rapp Collins Marcoa 50%, New York	113.0

Non-U.S. offices, location	Billings
Admar Reklam ve Pazarlama, Istanbul(NE)	4.5
Avanti DDB Needham, Oslo(MJ)	16.0
BMP DDB Needham, London(MJ)	353.8
Carder Gray DDB Needham, Toronto(MJ)	59.0
Carlsson & Bromas/DDBN, Stockholm(MJ)	28.9
Daehong Ad, Seoul(NE)	156.2
DDB Needham Heye & Partner, Vienna(MJ)	3.4
DDB Needham Italy, Milan(MJ)	48.8
DDB Needham Japan, Tokyo(MN)	9.3
DDB Needham & Guerreiro, Lisbon(MJ)	16.3
DDB Needham, Amsterdam(MJ)	53.1
DDB Needham, Auckland(MJ)	31.0
DDB Needham, Brussels(MJ)	39.3
DDB Needham, Hong Kong(MJ)	28.6
DDB Needham, Kuesnacht/Zurich(MJ)	23.6
DDB Needham, Mexico City(MJ)	10.1
DDB Needham, Paris(MJ)	249.8
DDB Needham, Singapore(MN)	4.3
DDB Needham, Sydney(MJ)	194.5
DDB Needham, Taipei(MJ)	9.8
Far East Advertising, Bangkok(MN)	26.5
Heye & Partner/DDB Needham, Munich(MN)	80.9
Mudra Communications, Ahmedabad, India(NE)	20.0
Naga DDBN DIK, Petaling Jaya, Malaysia(MN)	5.4
Olympic DDB Needham, Athens(MJ)	22.6
Tandem/DDB Needham, Madrid(MJ)	120.4
Wensauer DDB Needham, Munich(MJ)	192.3

Annual review

As one of the two leading agency networks of Omnicom Group, DDB Needham had a busy year of global acquisitions, affiliations and joint ventures including Korea (Daehong Advertising, Seoul), Greece (Olympic, Athens), Scandinavia (Carlsson & Broman, Stockholm; Avanti, Oslo and Nielsen Mikkelsen & Duus, Copenhagen), Germany (Wensauer & Partners, Stuttgart; Heye & Partner, Munich), France (Providence, Paris), and Austria (Heye & Partner, Vienna). All this is in keeping with the DDB trend of having non-U.S. affiliates account for almost half of total gross income and a third of overall profits. Major new business gains included Conforama Hypermarket ($50 million), Paris; various General Mills ($20 million) business, Philips Telecommunications & Information ($10 million), Amsterdam; ConAgra Country Pride chicken ($10 million); and the Henkel fa body and bath products ($5 million) for 25 countries. These offset losses: Energizer ($25 million), 1st Nationwide Financial Corp. ($15-$20 million), Johnson & Johnson Carefree line in 11 European markets ($15 million) and Clorox ($20 million in early 1990). During 1989 DDB assembled a pan-European marketing network of pr, corporate and financial communications, direct marketing and sales promotion agencies and at yearend was preparing to enter Eastern Europe with a joint venture in Hungary. In the U.S. it bought D'Arcy's San Francisco office as well as Jack Wodell Associates, a San Francisco agency with a roster of leading motion picture clients, and combined its general and retail agencies in San Francisco. Also it acquired Deulofeau-Wilson, a Culver City, Calif., retail agency, and Elgin Syferd, a Seattle agency. In addition, DDB established Premier Productions, an in-house commercial production unit in New York similar to Zone One Productions unit in its Chicago office. Personnel changes included installation of Bernard Brochand, former Eurocom chief executive, as president of DDB Needham International, Paris-based operation of DDB Needham Worldwide network, succeeding John Bradstock who became New York-based corporate exec vp-global accounts. Alan Pilkington, president of DDB Needham's Asia-Pacific region, added the job of director of corporate planning, and Joe Daly retired as chairman of DDB executive committee.

U.S. accounts

Gained: Chicago—ConAgra Broiler Co., Anheuser-Busch, General Mills, Ralston Purina Pet Food div, Household Bank; Denver—Alphagraphics, Deep Rock Water, Fashion Bar Stores, Mountain West Banking, Universal Studios; Hawaii—Dole Cannery Square, Diamond Co., Island of Kauai-tourist, City of Kapolei; Los Angeles—Bugle Boy, World Plan Executive; New York—Tropicana, Pepsico, Bermuda Department of Tourism, La Mansion del Rio, Ore-Ida, NEC, Weight Watchers, Michelin, Hersey Chocolate Milk Mix, Cadbury, York & Caramello, Gagliardi Cheese Steak-to-go, GTE Information Systems, Cigna Intracorp, Ortho TEC Project; Retail—California Re-Cycling, Pak-n-Save, Downtown Plaza, Wienerschnitzel; San Francisco—California Kiwi Fruit Commission, Idaho Potato Board, Hyundai Electronics, GTE Mobilnet, Parc Fifty Five Hotel, World Explorer Cruises; Washington—General Electric (various products), Comsat Video Enterprises, Satotravel, National Geographic, Erol's Video, Sporting Club of America.

Lost: Chicago—Eveready, Ramada Inn; Denver—Sir Speedy; Hawaii—McDonalds; Los Angeles—Fred Hayman; New York—The Nashville Network; Retail—Atari, Federated, Safeway Stores; San Francisco—Liquor Barn, Excelan/Kinetics, 1st Nationwide Bank; Washington—*Washington Post*, Associated Press.

International accounts

Gains: American Airlines—Australia, Belgium, New Zealand; Michelin—New Zealand; Mobil—Malaysia, Portugal; Henkel—Austria, Belgium, France, Netherland, Spain; J. Suchard/Toblerone—Germany, Switzerland; Seagram—Greece (Martell), Mexico; Bristol-Myers Squibb—Greece; Michelin Tire—Japan, Thailand; McDonalds—Mexico; Cigna International—Taiwan.

Losses: Delsey—Germany, Switzerland; Cigna—Italy; Bristol-Myers Squibb—Spain; Spanish Tourist Board—Switzerland; Henkel—Thailand.

Officers

Keith Reinhard, chmn-ceo; John Bernbach, president; Robert Huntington, vice chmn-coo; Bernard Brochand, president DDB Needham Intl; John Bradstock, corp exec vp; Gerald Germain, exec vp-cfo; Kent DeFelice, exec vp-dir corp dev; Alan Pilkington, president, Asia/Pacific Region; Lou Tripodi, exec vp-corp dir of public affairs; Steven Burton, sr vp-dir, worldwide finance. Presidents—Peter Falcone, New York div; Joel Hochberg, Chicago div; Robert Freeman, Detroit; Joseph P. Landy, Washington; Alan O. Pando, west (California western region); Dave Park, Los Angeles; Ron Snyder, San Francisco; Lawrence Gold, Denver; Frank Valenti, chmn-ceo, Milici Valenti Gabriel/DDB Needham, Hawaii; Dick Girvin, chmn-ceo, DDB Needham-Retail; Dave Syferd, chmn, Elgin Syferd/-DDB Needham, Seattle.

Headquarters

DDB Needham
437 Madison Ave.
New York, N.Y. 10022
Phone: (212) 415-2000
Fax: (212) 415-3520

RANK: 1

Dentsu Inc.

Tokyo
Gross income: **$1,316.4** million

Income & volume ($ in millions)

Worldwide	1989	1988	% ch
Gross income	1,316.4	1,176.2	11.9
Volume	10,063.2	8,939.3	12.6

Workforce & facilities

Worldwide	1989	1988	% ch
Employees	5,867	5,726	2.5
Offices	44	44	0.0

Office billings in 1989 ($ in millions)

U.S. offices, location	Billing
DCA Advertising, New York	94.0

Non-U.S. offices, location	Billing
Dentsu Inc., Tokyo	8,612.3
Dentsu (subsidiaries less AD)	579.9
AD Dentsu, Tokyo(MJ)	87.1
Dentsu Australia, Sydney(MJ)	68.0
HDM (27%)	689.9
SSB Advertising, Sydney(MJ)	44.0

Annual review

Multifaceted Dentsu retained its position as the world's largest advertising agency as it continued to expand from its Japanese base, establishing in January, 1989, Dentsu Spain, and forming joint ventures, DBM Toyko and DBM America, with Burson-Marsteller Dentsu also acquired Fortune Communication Holdings Ltd. (FCH) in Australia, and renamed the company Dentsu Australia Pty. Ltd. In July HDM, a company in which Dentsu owns 27%, acquired a share of Mattingly in Australia and also set up HDM Korea, joint venture in Korea with Oricom Inc. Seoul, one of the world's top 100 agencies. Dentsu returns, reflecting the broad range of its services, include Dentsu Prox, largely a TV ad production unit; AD Dentsu Tokyo, Osaka Nagoya, Kyushu and Hokkaido; Dentsu EYE, a woman's creative boutique Dentsu Wunderman Direct; DCA Advertising, its New York operation Dentsu Thailand and Dentsu's 27% ownership in HDM. Dentsu operations excluded from its advertising totals were Dentsu Printing; Dentsu Kosan, its rea estate holdings; Dentsu Cotec, a commercial printer; Dentsu PR Centre Dentsu Research Inc.; Dentsu Institute for Human Studies, a think-tank; Information Services International, a computer time-sharing joint venture with General Electric; Dentsu Burson Marsteller; its rep and liaison offices in Germany, Spain, etc., which don't operate as advertising agencies; and Dentsu Australia, acquired in September and not yet folded into the Dentsu account system.

Officers

Gohei Kogure, president-ceo. Exec vps—Minoru Kamata, Akitoshi Ishihara Shunya Hashiguchi.

Headquarters

Dentsu Inc.
1-11, Tsukiji, Chuo-ku
Tokyo 104, Japan
Phone: 813-544-5599
Fax: 813-546-2967

RANK: 69

Direct Marketing Group

New York
Gross income: **$25.7** million

Income & volume ($ in millions)

Worldwide	1989	1988	% ch
Gross income	25.7	26.1	(1.5)
Volume	149.6	152.9	(2.2)
U.S.			
Gross income	25.7	26.1	(1.5)
Volume	149.6	152.9	(2.2)

Workforce & facilities

Worldwide	1989	1988	% ch
Employees	625	637	(1.9)
Offices	6	6	0.0

Annual review

The direct response agency suffered a 2.2% decline in total billings, as it lost major client, Bell Atlantic, although new account gains—particularly two banks and BMW Motorcycles—helped hold down losses.

U.S. accounts

Gained: Associates National Bank, CIT Group, Coca-Cola USA, National Westminster Bank (all financial svcs), BMW North America.

Lost: Bell Atlantic.

Officers

John A. DePasquale, chmn; Suti Prakash, Stephen N. Finkel, Theodore C. Krismann, Hank Stromberg, sr vps; Paul R. Nelson, president-DMG 2; George Bradbury, president, Response Communications; William Marano, sr vp/GM, creative tech svcs.

Headquarters

Direct Marketing Group
477 Madison Ave.
New York, NY 10022
Phone: (212) 355-2530
Fax: (212) 838-0377

RANK: 39

W.B. Doner & Co.

Southfield, Mich
Gross income: **$52.1 million**

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	52.1	41.9	24.4
Volume	381.0	303.3	25.6
U.S.			
Gross income	44.2	37.0	19.4
Volume	309.0	268.7	15.0

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	572	523	9.4
Offices	8	8	0.0

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
W.B. Doner & Co., Baltimore	94.5
W.B. Doner & Co., Boston	8.4
W.B. Doner & Co., Chicago	11.9
W.B. Doner & Co., Cleveland	22.7
W.B. Doner & Co., Detroit	138.7
W.B. Doner & Co., Los Angeles	NA
W.B. Doner & Co., St. Petersburg, Fla	32.7

Non-U.S. offices, location	Billings
Doner Schur Peppler, Toronto	40.0

Annual review

The agency is looking to increase its international business, which more than doubled in billings in 1989 to account for 19% (up from 11% growth in 1988) of Doner's worldwide billings. In Canada, the source of most of Doner's international growth, its Toronto and Montreal offices merged with Schur, Peppler & Associates, Toronto, in forming Doner Schur Peppler with billings of $40 million. Expanding domestically, Doner opened a Boston office to handle the New England Ford Dealers Assn. account acquired late in 1988, and formed Consumer Diagnostics, a subsidiary marketing manufacturer-supported, health-screening programs to grocery stores. The agency won Uniroyal Goodrich Tire Co. ($15 million), VAX Appliances ($10 million) and Meijer Supermarkets ($10 million), which helped account for a 25.6% increase in total billings. The death in January 1990 of Wilfred B. Doner, agency founder and executive committee chairman, caused a reorganization in operating structure as chairman-CEO Herb Fried moved to head up operating committees in the co-headquarters of Southfield, Mich., and Baltimore. In early 1990, Isaac Lasky resigned as head of the in-house Hispanic marketing unit. Doner is looking at spinning off its Hispanic unit and merging it into an independent Hispanic agency.

U.S. accounts

Gained: Uniroyal Goodrich Tire Co., Chiquita Brands, VAX Appliance, Meijer Inc., U.S. Dept of Commerce-NOAA, NuVision, Scudder Stevens Clark, Maryland National Bank, Vroman Foods, Affiliated Banc Group of Illinois

Lost: Bormans Inc., Cub Foods, Kentucky Lottery, Farmer Jack/A&P Supermarkets-Detroit, Ourisman Chevrolet-Baltimore, Western Auto Supply Co.

International accounts

Gained: Honda Canada

Officers

Herb D. Fried, chmn-ceo; James Dale, vice chmn-corp creative dir; Don Riesett, exec vp-dir acct mgmt; David Sackey, exec vp-genl mgr, Baltimore; Kevin Wixted, sr vp finance; John Considine, exec vp-dir strategic planning; John DeCerchio, exec vp-exec creative dir; Alan Kalter, exec vp-dir retail; Steve Levine, sr vp-exec media dir; H. Barry Levine, cfo; Skip Roberts, exec vp-genl mgr, Detroit

Headquarters

W.B. Doner & Co.
25900 Northwestern Highway
Southfield, Mich. 48075
Phone: (313) 354-9700
Fax: (313) 827-0840

RANK: 61

Duailibi Petit Zaragoza Propaganda

Sao Paulo
Gross income: **$34.6 million**

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	34.6	NA	NA
Volume	139.6	NA	NA

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	400	410	(2.4)
Offices	3	3	0.0

Annual review

DPZ expects to build on its 5.9% dollar-billings growth in 1989 to a predicted 10% based on growth from new clients gained in 1989 and general market expansion. Figures for subsidiaries in Rio de Janeiro, Brasilia and Blumenau are consolidated under DPZ's Sao Paulo main office.

Accounts

Gained: Petrobras-Petroleum Co. (institutional); Copa Papeis (tissue paper, foil, tablecloths); Moinho Vera Cruz (flours); McDonald's (fast-food); Alcatex (hosiery); Visconti (chocolate Easter eggs, Christmas cakes); Johnson & Johnson (bath and bath line); Central Bank of Brazil; Siderbras (steel); Banco Portugues do Atlantico; Sadia (jelly)

Lost: Tabacow (carpets)

Officers

Roberto Duailibi, Francesco Petit, Jose Zaragoza, Ronald Persichetti, associated dirs; Flavio O. Conti Jr., general mgr; Jose A. Negrini, admin general mgr; Juan Alberto Vicente, general mgr-DPZ Rio de Janeiro; Daniel Barbara, media general mgr; Paulo Chirotti, Helga Miethke, creative mgrs; Jose Carlos Piedade, account exec mgr.

Headquarters

DPZ—Duailibi, Petit, Zaragoza Propaganda
Av. Cidade Jardim
280-Sao Paulo, Brazil
Phone: 55-11-280-5433
Fax: 55-11-853-4298

RANK: 74

Evans Communications

Salt Lake City
Gross income: **$24.0 million**

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	24.0	22.1	8.5
Volume	160.0	147.5	8.5
U.S.			
Gross income	24.0	22.1	8.5
Volume	160.0	147.5	8.5

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	356	336	6.0
Offices	10	10	0.0

Office billings in 1989 ($ in millions)

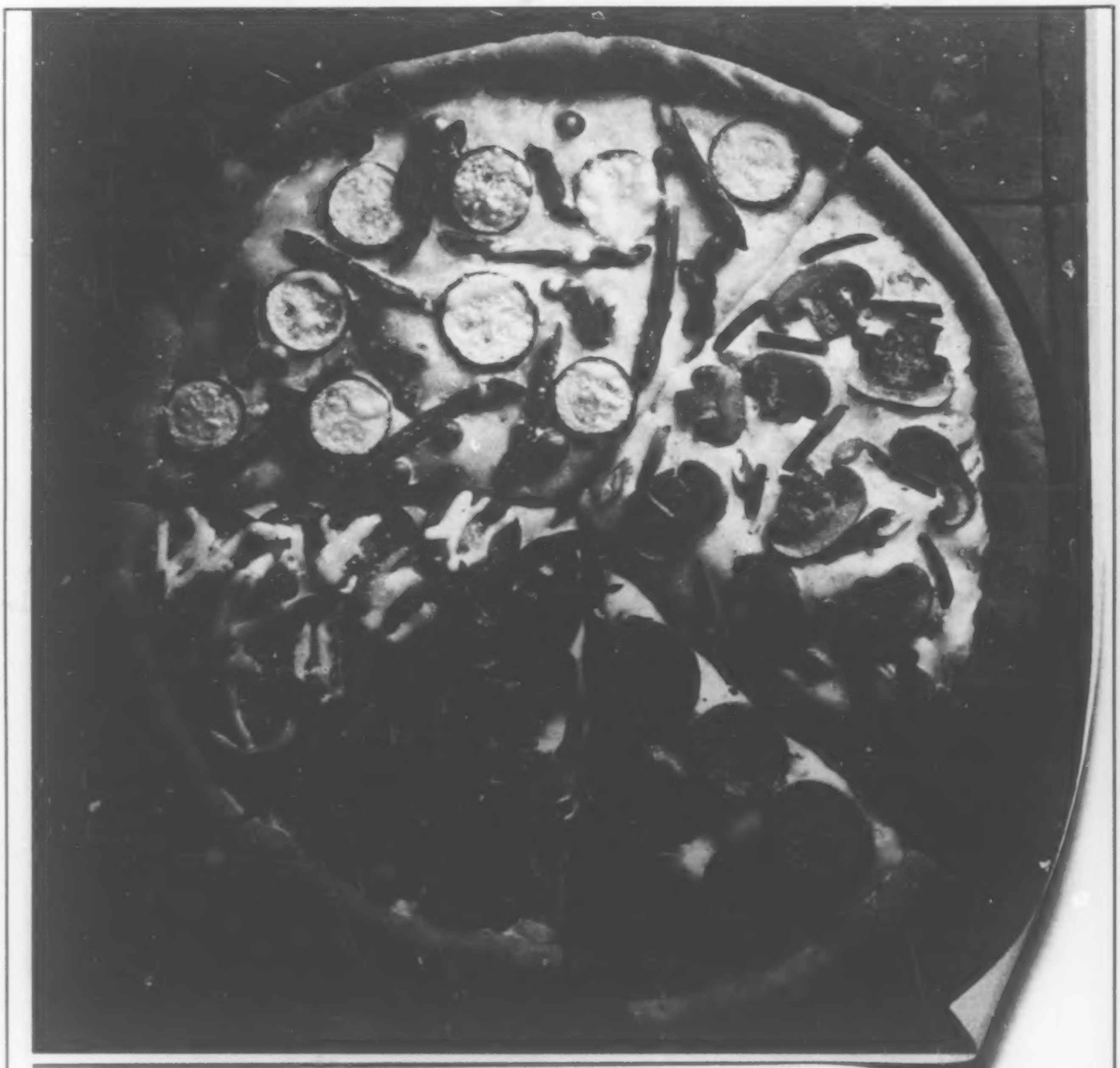
U.S. offices, location	Billings
Evans Communications, Dallas	13.0
Evans Communications, Denver	12.0
Evans Communications, Los Angeles	16.0
Evans Communications, Phoenix	14.0
Evans Communications, Salt Lake City	26.0
Evans Communications, San Francisco	15.0
Evans Communications, Seattle	64.0

Annual review

A growth rate of 7.5% is forecasted for 1990 based on new account gains from FHP ($5 million), the *Dallas Times Herald* and Del Webb Sun City project, each worth about $1.5 million. This will help soften the loss of $15 million in billings from the departures of Quaker State Minit Lube ($9 million), Alaska Seafood Marketing Institute and Frederick & Nelson (both about $3 million). Evans bought Ogilvy Group subsidiary Cole & Weber's Salt Lake City office. The agency secured exclusive North American rights to advertise on U.S.S.R.'s planned broadcast of the 1990 Goodwill Games in Seattle and is in a joint venture with King Broadcasting's Northwest Television Sales to sell Soviet time.

U.S. accounts

Gained: FHP, Utah Travel Council (winter program), Deseret Medical, Del Webb (Sun City Project), United Artists-Cable, *Dallas Times Herald*



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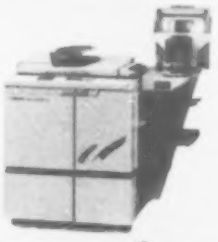

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Lost: Quaker State Minit Lube, Alaska Seafood Marketing Institute (domestic program), Frederick & Nelson, Hamburger Hamlet.

Officers

Jon L. Johnson, president-ceo; L. Glen Snarr, chmn; Charles R. Bartholomew, president-Evans/Salt Lake City; Donald B. Kraft, chmn-Evans/Kraft; M. Terrence Lynch, president-Evans/Los Angeles; R. Webb Sherrill, president-Evans/Dallas.

Headquarters

Evans Communications Inc
4 Triad Center, Suite 750
Salt Lake City, Utah 84180
Phone: (801) 364-7000
Fax: (801) 364-0431

RANK: 16

EWDB Worldwide

Paris
Gross income: **$381.0** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	381.0	NA	NA
Volume	2,702.3	NA	NA
U.S.			
Gross income	82.4	NA	NA
Volume	684.0	NA	NA

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Della Femina, McNamee EWDB, New York	617.2
Cohn & Wells EWDB, San Francisco	45.8
Heller Breene, Boston	21.1

Non-U.S. offices, location	Billings
Australie, Levallois-Perret, France(MJ)	17.2
Ball Partnership, Bangkok(MJ)	4.9
Ball Partnership, Hong Kong(MJ)	40.2
Ball Partnership, Kuala Lumpur, Malaysia(MJ)	6.6
Ball Partnership, Singapore(MJ)	6.2
Ball Partnership, Sydney(MJ)	50.9
Ball Partnership, Taipei(MJ)	7.1
Belier EWDB Paris, Paris(MJ)	195.5
ECOM, Neuilly, France(MJ)	164.4
Eldorado, Paris(MJ)	50.0
Equateur, Paris(MJ)	94.1
EWDB Espana, Madrid(MJ)	35.7
EWDB Italia, Milan(MJ)	186.4
FCO, London(MJ)	36.4
Kalle Londers Deroost, Brussels(MJ)	8.9
Kleie & Partners, Amsterdam(MJ)	16.0
M.A.D., Paris(MJ)	54.6
Robert & Partners, Paris(MJ)	87.8
Synergie EWDB, Paris(JV)	188.1
V und B, Hamburg(MJ)	9.4
WCRS Mathews Marcantonio, London(MJ)	255.7
WCRS dma, London(MJ)	6.0
Zangenberg & Lembourn, Copenhagen(MJ)	4.2

Annual review

French agency holding company Eurocom bought controlling interest in WCRS' advertising agency business in late 1989, giving birth to Eurocom WCRS Della Femina Ball. Structurally, the network is comprised of two halves, each managing various global regions. One half, known as EWDB Ltd., fully owns 100% of U.K., U.S. (largely Della Femina, McNamee/EWDB) and Asia/Pacific (Ball Partnership) agencies in the network. The other half, EWDB S.A., directly controls 30% of the French agencies, and fully controls the European agencies apart from France. However, Eurocom indirectly controls 100% of EWDB S.A., while WCRS directly controls 40% of EWDB Ltd. with the rest controlled by Eurocom. Since its founding, EWDB has expanded with agency acquisitions in Denmark, Germany, Italy and Spain. A new agency, Belier WCRS Espana, also was founded in 1989 prior to the advent of EWDB. EWDB estimates its net account gains in 1989 reached $267 million billings and included the Pan Am worldwide account. WCRS, out of its disinvestment in advertising, plied the $335 million it got from Eurocom to boost its holdings from 50% to 100% in Europe's independent media buying agency, Carat International.

Accounts

Gained: United Distillers' Johnnie Walker Red and Black Label—Europe; Parker Pens—Asia/Pacific; Lego, Elf—France.
Lost: Sheraton Hotels, Taster's Choice coffee.

Officers

Joint chmn—Robin Wight-EWDB, Jerry Della Femina-EWDB; ceo-Della Femina, McNamee/EWDB; Tim Breene, ceo-EWDB; John Biskupski, cfo-EWDB; Michael Ball, chmn-chief exec, Ball WCRS Partnership; Louise McNamee, president-coo, Della Femina, McNamee EWDB; Pierre Lecosse, intl dir-EWDB Europe; Roger Mathews, chmn-ceo, EWDB, Mathews Marcantonio; William Vaughan-Lewis, dir operations-EWDB.

Headquarters

EWDB Worldwide
2729 Rue des Poissonniers
92522 Neuilly-sur-Seine, France
Phone: 331-47-22-27-27
Fax: 331-47-47-88-75

RANK: 48

FCA! Group

Paris
Gross income: **$42.3** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	42.3	NA	NA
Volume	281.7	NA	NA

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

Office billings in 1989 ($ in millions)

Non-U.S. offices, location	Billings
CID Publicidad, Madrid(MN)	57.7
FCA! Heslop Beguivin, Brussels(MJ)	4.8
FCA!, Suresnes, France(MJ)	141.5
FCA Sabbatini Baldoni Panzeri, Milan(MJ)	42.2
Lego-FCA!, Duesseldorf(MJ)	8.5
Mavity Gilmore Jaume Hill Brooks FCA!, London(MJ)	73.7
VVVH FCA!, Amsterdam(MN)	19.7

Annual review

FCA! Group, an emerging Europewide network, expects growth of 18.8% in 1990 as it gains a full year's worth of billings from agencies purchased in 1989. Acquisitions included Brooks Legon Bloomfield in the U.K. which merged into the existing FCA! agency now called Mavity Gilmore Jaume Hill Brooks FCA!, and CID, a five-shop Spanish agency in which FCA! purchased 25% after its previous Spanish partner, Vitruvio, left the group. FCA! purchased Paris and Bordeaux agencies that were merged into existing shops resulting in new names—Moors Olivier Chauvat Mougin, Paris, and Atlantique FCA!, Bordeaux. The group also formed FCA! Heslop Beguivin after FCA! parted with its existing agency in Belgium, and created Lego-FCA! in Stuttgart, West Germany. France remains the core of the FCA! network. The suburban Paris shop from which the network emerged remains the group's lead agency. Under the FCA! banner there are 16 French agency operations specializing in all aspects of advertising.

Accounts

Gained: Europewide—Helena Rubinstein, Burberry's, Ducros (spices), Ungaro.

Officers

Philippe Calleux, chmn; Jean Feldman, Marc Bourgery, Jean-Fred Koenig, vice chmn.

Headquarters

FCA!
26, Rue Salomon de Rothschild
92150 Suresnes
France
Phone: 331-42-04-25-75
Fax: 331-42-04-21-96

RANK: 88

Thomas G. Ferguson Associates

Parsippany, N.J.
Gross income: **$20.6** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	20.6	16.9	22.1
Volume	120.7	102.1	18.2
U.S.			
Gross income	20.6	16.9	22.1
Volume	120.7	102.1	18.2

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	120	110	9.1
Offices	1	1	0.0

Annual review

A healthcare agency, Ferguson showed a strong 18.2% growth in billings—$14.5 million from new account gains and $10.6 million more from existing accounts—that offset the departure of Miles Laboratories, which accounted for $6.5 million in billings. A 30% growth in billings is predicted in new and existing business this year, approximating billings growth in those sectors each of the past two years.

U.S. accounts

Gained: Bristol-Myers Squibb, Johnson & Johnson, Rorer Pharmaceutical, Schering-Plough, Warner-Lambert.
Lost: Miles Laboratories.

Officers

Thomas G. Ferguson, chmn-ceo; John F. Zweig, president-coo; Pamela A. Rossetti, exec vp-cfo & admin; John P. Szlasa, exec vp-integrated comm svcs; Rex Bright, sr vp-general mgr, health technologies grp; German Bustos, sr vp-dir creative svcs; Edward J. Gorzalski, sr vp-mkt planning, mkt rsch & media svcs; Howard Larsen, sr vp; Robert P. Muratore, sr vp-mgmt super; Marne Weaver, sr vp-mgmt super, dir new business coordination.

Headquarters

Thomas G. Ferguson Associates
30 Lanidex Plaza West
Parsippany, N.J. 07054
Phone: (201) 884-2200
Fax: (201) 884-2487

RANK: 12

Foote, Cone & Belding Communications

Chicago
Gross income: **$510.9** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	510.9	483.9	5.6
Volume	3,413.9	3,242.5	5.3
U.S.			
Gross income	280.5	273.7	2.5
Volume	1,871.2	1,825.8	2.5

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Foote, Cone & Belding, Chicago	604.0
Foote, Cone & Belding, Los Angeles	326.0
FCB/Leber Katz Partners, New York	530.0
Foote, Cone & Belding, San Francisco	330.0
Albert Frank-Guenther Law, New York	39.7
Albert Frank-Guenther Law, San Francisco	2.1
Lewis, Gilman & Kynett, Philadelphia	106.0
IMPACT, Chicago	77.0
Wahlstrom & Co., Stamford, Conn	38.7
Wahlstrom/West, Los Angeles	16.9
Wahlstrom/LG&K, Philadelphia	7.8
Wahlstrom/Midwest, Chicago	4.2

Non-U.S. offices, location	Billings
AP-Foote, Cone & Belding, Kuala Lumpur, Malaysia(MN)	12.4
Basic/FCB, Manila(MN)	16.9
Daiko/FCB Impact, Tokyo(JV)	5.6
FCB de Mexico, Mexico City(MJ)	13.1
FCB Publicidad, Guatemala City(MJ)	4.6
FCB Puerto Rico, Isla Verde, P.R. (MJ)	25.8
FCB/Artefilme, Guayaquil, Ecuador(MJ)	2.2
FCB/Artefilme, Tegucigalpa, Honduras(MJ)	2.2
FCB/Hocking, Adelaide(MJ)	5.7
FCB/Puma, Bogota(MJ)	10.2
FCB/Ronalds Reynolds, Toronto(MJ)	114.3
FCB/Shorter, Perth(MN)	8.1
FCB/Siboney Publicidade, Sao Paulo(MJ)	47.4
FCB/Siboney, San Jose(MJ)	3.4
FCB/Siboney, Santo Domingo(MJ)	3.6
FCB/Siboney/Uribe, Caracas(MJ)	16.2
Foote, Cone & Belding, Hong Kong(MJ)	10.1
Foote, Cone & Belding, Sydney/Melbourne(MJ)	85.4
Hernandez/FCB, Port of Spain, Trinidad(MN)	3.8
Lindo FCB, Kingston, Jamaica(MN)	4.3
Lindsay Smithers-FCB, Johannesburg(MN)	75.6
Mainstream/FCB, Auckland(MN)	6.2
Partnership in Advertising, Johannesburg(MN)	12.5
Pragma/FCB Publicidade, Buenos Aires(MN)	49.5
Prakit & FCB, Bangkok(MN)	18.3
Publicis-FCB B.V. Paris(MN 49%)	1,178.6
P.T.Forum Cahayabuana, Jakarta(MJ)	3.4
Yaratim/FCB, Istanbul(MN)	6.1

Annual review

A third-quarter streak of $100 million in new business gains at the Chicago office alone balanced shakeout losses from the FCB and Publicis Inc. alliance, and brought modest billings growth of 5.3% for 1989. FCB won Cadbury Schweppes' $20 million-plus Canada Dry and Sunkist; S.C. Johnson & Son and Kayser-Roth Hosiery both consolidated business at FCB, adding $40 million and $10 million, respectively; and existing client Coors awarded its $20 million Keystone and Keystone Light brands. Adding to gains, the San Francisco office landed the $75 million Taco Bell account in May and opened new offices in Atlanta, Dallas and Denver. Other new assignments: Levi Strauss & Co. ($22 million), RJR Nabisco ($150 million network, syndication and cable TV media buying) and Clorox detergent ($20 million). In February, FCB sold Golin/Harris Communications PR to Shandwick PLC, London, in exchange for Shandwick stock to increase presence in the global PR market and to prevent potential conflict of interest in FCB's unsuccessful pitch for Burger King (Golin/-Harris handles McDonald's PR). As of February 1990, the New York office won the $8 million Jamaica Tourist Board account on condition of sale of FCB's 24% interest in Lindsay Smithers-FCB in Johannesburg. FCB totals include 49% of Publicis-FCB B.V. and 100% of FCB operations outside Europe.

U.S. accounts

Gained: New York—Times Mirror Magazines, Marriott Hotels & Resorts, RJ Reynolds (Winston), Colgate-Palmolive (Automatic Dishwasher Detergent, Fresh Start), Lipton (Sunkist Fruit Spooners), Nabisco (cookie brands, media buying). Chicago—Burlington Sheer Indulgence Hosiery, Cadbury-Schweppes (Canada Dry, Sunkist), Coors (Keystone, Keystone Light, Rocky Mountain Water), Citicorp, Kraft Tombstone Pizza. Los Angeles—Emjoi. San Francisco—Taco Bell, Novell, Johnson's Wax, Dreyers ice cream.
Lost: New York—Econo Lodges of America, Bermuda Tourism. Chicago—First Chicago Corp. Los Angeles—Southern California Gas. San Francisco—Holland-America Lines.

International accounts

Gained: Diner's Club—Venezuela (Banco Mercantil); Nestle—Dominican Republic, Thailand (Dico Coffee); Mazda—Australia; S.C. Johnson—Hong Kong (personal care/household prods); NEC—New Zealand. *For European accounts, see Publicis/FCB B.V.*
Lost: Pirelli Tires—Switzerland; Elida Gibbs Toiletries—UK; Diner's Club—Hong Kong.

Officers

Norman W. Brown, chmn-ceo FCB; Stanley H. Katz, vice chmn FCB; Craig R. Wiggins, chmn FCB Intl; Antonio S. Beja, president FCB Intl-vice chmn Publicis-FCB; W. Bruce Mason, chmn FCB Central; Thomas F. Randolph, chmn FCB West; Dale F. Perona, exec vp-cfo FCB; Charles H. Gunderson Jr., sr vp-secretary-treas FCB; Gregory W. Blaine, exec vp-dir corp resources & devel FCB.

Headquarters

Foote, Cone & Belding Communications
101 East Erie St.
Chicago, Ill. 60611
Phone: (312) 751-7000
Fax: (312) 751-3501

RANK: 93

Geer, DuBois

New York
Gross income: **$19.5** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	19.5	18.0	8.3
Volume	130.0	120.0	8.3
U.S.			
Gross income	19.5	18.0	8.3
Volume	130.0	120.0	8.3

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	201	190	5.8
Offices	1	1	0.0

Annual review

New client Brown & Williamson Tobacco Corp. and recently acquired Sony Communications Product Co. accounted for part of the $10 million increase in billings from new and existing business. The agency maintained its $20 million Jaguar account after Jaguar was bought by Ford Motor Co. A 10% growth is forecasted for 1990.

U.S. accounts

Gained: Brown & Williamson Tobacco Corp., Sony Corp.

Officers

Peter Geer, president; Rodney Underwood, exec vp-creative dir; Doria Steedman, exec vp, dir-agency operations; Joseph Bruce, Michael Garcia, Timothy O'Leary, sr vps-mgmt supers; David Idema, Glenn Kaplan, Marce Mayhew, sr vps-group creative dirs; Dana Christensen, sr vp-rsch dir; Tom Pearse, sr vp-print prod mgr; Joy Sliwa, sr vp-media dir; Rona Yohalem, sr vp-strategic planning; Edward Parella, vp-treasurer.

Headquarters

Geer, DuBois Inc.
114 Fifth Ave.
New York, N.Y. 10011
Phone: (212) 741-1900
Fax: (212) 255-7570

RANK: 71

Gold Greenlees Trott PLC

London
Gross income: **$24.4** million

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Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	24 4	22 1	10 4
Volume	164 4	142 6	15 3

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	673	547	23 0
Offices	17	10	70 0

Annual review

Strong account gains, particularly the $12 million Access account win, offset the loss of Mazda to give the agency a 15.3% increase in billings in 1989. The London shop, well known for its creative work, is now better connected internationally through its holding company, GGT PLC, which purchased 50% of Austin, Texas-based GSD&M, a shop billing $150.8 million in 1989. GGT has an option to acquire the remainder through 1992. In May, GGT PLC acquired a leading Minneapolis agency, Martin/Williams. During the year GGT's Atlanta-based subsidiary, Babbit & Reiman, opened a New York office, and Coba, GGT's London-based management consultancy, opened Atlanta, New York and Paris offices.

Accounts

Gained: Access (card), Toshiba post office counters, Pilkington, Conoco jet fuel, London Docklands Development Corp.

Lost: Cadbury Wispa, Mazda, Holsten Export beer.

Officers

Michael Greenlees, Michael Gold, joint chmn; David Trott, creative dir; Matthew Allen, grp financial dir.

Headquarters

Gold Greenlees Trott PLC
82 Dean St
London W1V 5AB
Phone: 441-437-0434
Fax: 441-494-0118

RANK: 13

Grey Advertising

New York
Gross income: **$498.9** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	498 9	432 8	15 3
Volume	3,267 4	2,886 5	13 2
U.S.			
Gross income	240 7	227 9	5 6
Volume	1,605 3	1,520 3	5 6

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	6,358	5,690	11 7
Offices	210	165	27 3

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Grey Advertising, Los Angeles	160 2
Grey Advertising, New York	1,386 8
Grey Advertising, San Francisco	58 3
Non-U.S. offices, location	**Billings**
Amex & Grey, Bangkok(MN)	7 5
Aspac & Grey, Manila(MN)	4 1
Casares Grey, Buenos Aires(ND)	7 5
Canajans-Grey Reklamcilik, Istanbul(MN)	29 7
CMP & Grey, Lima(ND)	4 9
Fischer-Grey, Caracas(ND)	16 0
Grey Advertising (NZ), Auckland(ND)	6 0
Grey Australia, Sydney(MJ)	40 0
Grey Austria, Vienna(MJ)	34 1
Grey Canada, Toronto(MJ)	119 8
Grey Chile, Santiago(MN)	8 5
Grey Communications Group, Copenhagen(MJ)	51 1
Grey Communications Group, London(MJ)	540 7
Grey Espana, Madrid/Barcelona(MJ)	51 4
Grey Gruppe Deutschland, Duesseldorf(MJ)	253 5
Grey Holdings, Johannesburg(MN)	98 6
Grey Malaysia, Kuala Lumpur, Malaysia(MN)	5 0
Grey Mexico, Mexico City(MJ)	12 3
Grey Uruguay, Montevideo, Uruguay(MN)	2 1
Grey-Daiko, Tokyo(JV)	78 7
Grey, Amsterdam(MJ)	59 1
Grey, Brussels(MJ)	39 1
Grey, Geneva(MN)	33 3
Grey, Paris(MJ)	143 9
Grey, Singapore(MN)	10 8
Hwa Wei & Grey, Taipei(MN)	30 8
Jensen Grey, Oslo(MN)	11 1
Milano & Grey, Milan(MJ)	148 3
MPM Propaganda, Sao Paulo(NE)	220 7
People & Grey, Hong Kong(MJ)	24 5
Sek & Grey Oy, Helsinki(MN)	70 7
Swedish Communications, Stockholm(MJ)	98 8
Trikaya Grey, Bombay(ND)	10 4
West Indies & Grey, San Juan(ND)	35 2

Annual review

Grey continued to keep its sights glued to the international horizon in 1989. Grey Direct acquired a U.K. direct marketing agency, Dewar Coyle MacLean, and Grey International gained interest in a German shop and Netherlands pharmaceutical agency. Two New Zealand agencies were merged and renamed Grey-New Zealand. European business expanded by more than 25% in 1989 to pace international growth. Grey has turned in three consecutive years of double-digit growth overseas. It established a European Management Board, recently acquired the $15 million SmithKline Beecham's Contac account and the $8 million Ralston Purina Wonder bread account. This continued strength abroad added to heavy new assignment activity in the last quarter of 1989 helped produce a growth of $380.9 million in billings, up 13.2%. Increases from existing clients, led by Thompson Medical Co. and Procter & Gamble ($18 million Sure and $42 million Noxell Cover Girl), produced $254.8 million of the gain, while new accounts—in particular, Tonka ($8 million), Sun Diamond Growers of California ($7 million), 3M ($10 million), Vienna/Budapest World's Fair ($50 million over 5 years) and U.S. Department of Treasury ($15 million over three years)—generated $190.1 million in new billings to offset $64 million in lost billings. The agency sold its interest in LBS Communications, a syndicated TV operation, for $38 million. Norman Vale retired as managing director, Grey International, in early 1990 and will remain as a consultant. Assuming his duties are Frank Clarke, senior vp, and Rob Parker, senior vp-international finance.

U.S. accounts

Gained: New York—Ernst & Young, NYC Off-Track Betting Corp., Team NFL clothing and accessories, Tonka Corp., U.S. Coast Guard recruitment, U.S. Mint, Vienna/Budapest World's Fair. Grey Western Division—Mag Instruments, Sun Diamond Growers of Calif. (Sun-Maid Growers raisins), Dysan Brand floppy disks.

Lost: New York—Uniroyal Goodrich Tire Co. (B.F. Goodrich tires).

International accounts

Gained: Armor All—Japan; BankAmerica—Japan, Mexico; Bayer—Hong Kong; Beecham—Thailand; Block Drug—Argentina, Austria; Bristol-Myers—Malaysia; Ciba Geigy—Sweden; Corning—Hong Kong, Mexico, New Zealand, Taiwan; Dunlop—France, India; Mars—Norway, Spain; Mitsubishi—Belgium; Philips Telephone System—Singapore; Procter & Gamble—Australia, Philippines, Taiwan; Samsonite—Spain; G.D. Searle—Mexico; 7-Eleven—Malaysia, Thailand; Shell—Denmark; Tonka—Netherlands, Norway, Sweden; Warner Bros.—Belgium; Wyse Technology—Italy.

Lost: Numerous local accounts.

Officers

Edward H. Meyer, chmn-president; Robert L. Berenson, exec vp-admin; Barbara S. Feigin, exec vp-dir strategic svcs; Steven G. Felsher, exec vp-finance, worldwide; J. Alec Gerster, exec vp-dir media & programming svcs; Richard M. Karp, exec vp-dir creative svcs; Stephen A. Novick, exec vp-deputy creative dir.

Headquarters

Grey Advertising Inc.
777 Third Ave.
New York, N.Y. 10017
Phone: (212) 546-2000
Fax: (212) 546-1495

RANK: 79

Griffin Bacal

New York
Gross income: **$22.4** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	22 4	20 0	12 0
Volume	176 2	155 8	13 1
U.S.			
Gross income	20 7	18 4	12 3
Volume	162 7	143 9	13 1

Workforce & facilities

Worldwide	1989	1988	% ch
Employees	193	187	3.
Offices	2	2	0.

Annual review

A billings increase of 13.1% was attributed to the acquisition of the Sharp Electronics Corp. account ($26.2 million) and expanded billings from existing client Hasbro ($18 million from its Coleco business), that offset the departure of $27 million in billings. Some $16.5 million o the losses were from other Hasbro business. A 6% growth in billings is predicted for 1990 based on expansion of existing accounts, including newly acquired Milton Bradley U.K. ($2.2 million) and Gruner & Jahr's *Young Miss* ($1 million).

U.S. accounts

Gained: Hasbro, Gruner & Jahr, Sharp Electronics Corp.

Lost: Commodore Business Machines Miles Inc.

International accounts

Gained: Milton Bradley UK, Malaysian Airlines, Asics Footwear.

Officers

Thomas L. Griffin, Jules M. Bacal, co-chmn; Paul Kurnit, president-coo Arthur Heller, exec vp-dir media; Lenny

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Loekum, exec vp-creative dir; Christopher Mill, exec vp-dir new business; William J. Beihl, sr vp-cfo; Arnie Berger, Norman Hajjar, Bob Kantor, sr vps-group dirs; Tom Hadlock, Carl Teitelman, David Biebelberg, vps-mgmt supers; Jay Bacal, sr vp-assoc creative dir; Marcia Essig, Joe Donney, Bill Kurth, Maurice Mahler, Lynne McNamara, Ted Shaw, Ed Torton, vps-assoc creative dirs; Loretta Volpe, sr vp-media dir; Jeff Dunetz, Steve Margaritov, vps-assoc media dirs; Heide Kahme, vp-assoc media buying dir; Lisa Kaye, Mary Tricoli, vps-media group supers.

Headquarters

Griffin Bacal Inc.
130 Fifth Ave.
New York, N.Y. 10011
Phone: (212) 337-6400
Fax: (212) 645-0618

RANK: 89

GSD&M

Austin, Texas
Gross income: **$20.2** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	20.2	15.3	32.1
Volume	150.8	124.1	21.5
U.S.			
Gross income	20.2	15.3	32.1
Volume	150.8	124.1	21.5

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	234	171	36.8
Offices	1	2	(50.0)

Annual review

GSD&M in February 1990 became part of GGT Group, London, which purchased 50% of the Texas agency for an estimated $48.5 million with an option to buy the remainder through 1992. During 1989, GSD&M had a net billings increase of $26.7 million over 1988 that came mainly from increased spending from Wal-Mart, Texas Department of Commerce and Coors Brewing, aided by new accounts, Ben Hogan, CompuAdd Corp. and Domino's Pizza. These gains more than offset $12.3 million in billings that left with such clients as *The Wall Street Journal* ($10 million) and Mr. Gatti's Inc. pizza ($3 million). The employee count jumped by 37% and all business from former offices in Dallas, Houston and San Antonio was consolidated in Austin. Projections for 1990 of a 20% increase reflect "strong creative strides and prudent financial planning," reports GSD&M. GGT, whose head agency in London, Gold Greenlees Trott, is one of the world's 100 largest agencies, has been expanding rapidly in the U.S. In 1989, GGT acquired Martin/Williams, Minneapolis, and in 1988, Babbit & Reiman, Atlanta.

U.S. accounts

Gained: Ben Hogan, CompuAdd Corp., Domino's Pizza (Hispanic), Pearle Vision (project), PGA Tour, United Savings Assn.

Lost: Barq's Inc., Gibraltar, Mr. Gatti's Inc., Southwest Airlines (media), *Wall Street Journal*.

Officers

Stephen Gurasich, chmn-ceo; Roy Spence, president; Tim McClure, exec vp-exec creative dir; Judith Trabulsi, exec vp-media dir; Gary Brahl, sr vp-creative dir; Charles Grady, Steve Wille, Steve Dalbey, Steve Braasch, sr vps-acct dirs; Bob Mazerov, vp-rsch dir; Raoul Rodriguez, sr vp-Hispanic svcs.

Headquarters

GSD&M
1250 Capital of Texas Hwy South
Suite 400
Austin, Texas 78746
Phone: (512) 327-8810
Fax: (512) 327-1775

RANK: 10

Hakuhodo Inc.

Tokyo
Gross income: **$585.5** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	585.5	522.2	12.1
Volume	4,449.2	3,939.1	12.9

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	3,657	3,507	4.3
Offices	43	38	13.2

Annual review

Billings growth of 9% in fiscal 1990 is predicted, reflecting a favorable business climate although not as robust as 1989 when Hakuhodo recorded growth of 12.9%. During 1989 the agency expanded its overseas network, establishing London and Paris subsidiaries, and local offices in Milan and Barcelona and Taipei. Domestically the agency participated extensively in expositions and fairs in Yokohama, Fukuoka and other cities, engaged in joint production and distribution in the movie industry and established new business for urban space development and satellite broadcasting. Hakuhodo has joint ventures with Lintas:Worldwide and McCann-Erickson Worldwide in Japan and will be servicing the Nissan corporate account in Europe with TBWA as partner. Hakuhodo and TBWA competed with two other Japanese-European agency "teams" in winning the account this January. The Japanese are forming such partnerships for account pitches because of the lack of Japanese offices in Europe.

Accounts

Gained: Nissan corporate Europe (won in Jan. '90 in tandem with TBWA), Citizen Watch—U.K.

U.S. accounts

Gained: LA—TEAC Data Storage, Interactive Systems Corp.

Officers

Hiromasa Seki, honorary chmn; Michitaka Kondo, chmn & representative dir; Ritsuo Isobe, president-ceo; Atsushi Okumoto, exec vp; Sr managing dirs—Junichi Shimizu, Hirotada Keki, Shigeru Ohno, Takashi Shoji.

Headquarters

Hakuhodo Inc.
3-22 Kanda-Nishikicho, Chiyoda-ku
Tokyo 101, Japan
Phone: 813-233-6160
Fax: 813-233-6166

RANK: 41

Hill, Holliday, Connors, Cosmopulos

Boston
Gross income: **$51.6** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	51.6	50.2	2.7
Volume	344.0	335.0	2.7
U.S.			
Gross income	43.9	43.1	2.0
Volume	293.1	287.4	2.0

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	523	530	(1.3)
Offices	5	5	0.0

Annual review

Newly acquired accounts led by the Insurance Information Institute ($23.5 million), and healthy growth of $20.2 million in existing business including Nissan Motor Corp.'s Infiniti, Hyatt Hotels and Spalding Golf Balls, offset $37.8 million in lost business to produce a 2.7% increase in billings for 1989. The agency entered into a non-equity partnership with Wakeman & deForrest, forming Hill Holliday Wakeman deForrest in Marina del Rey, Calif. Layoffs hit both the New York office as several Revlon group accounts shook free, and the Boston headquarters as Royal Crown Cola pulled its $10 million account. In early 1990, a Toronto service office was opened to handle the Canadian introduction of Nissan's Infiniti ($5 million-$10 million).

U.S. accounts

Gained: A.T. Cross, Boston Edison, Revlon Inc. (new deodorant), Heinz U.S.A. (Weight Watchers new product), Insurance Information Institute, *Los Angeles Times*, PacTel Cellular, SportsChannel America, Staples Inc.

Lost: Aer Lingus, Royal Crown Cola, Revlon Inc. (Intimate, Trouble, Charlie, Eye Gel, Clean & Clear Shampoo).

International accounts

Gained: United Biscuits, W.H. Smith Group, Bakeland Co. Ltd., J&R Bossini International Ltd., Ritz Asia.

Officers

George J. Hill III, chmn; John M. Connors Jr., president-ceo; Jack Sansolo, president-USA; Dick Pantano, vice chmn-creative dir; Joseph Norberg, cfo-treasurer; Felice Kincannon, exec vp, managing dir-Boston; Carolyn Clark, exec vp-dir mktg svcs; Ann Finucane, exec vp, dir acct & creative svcs; Justine Harrington, exec vp, co-dir acct svcs; John Mills, exec vp, finance. New York: John Ferrell, exec vp-chief creative officer; Susan Smith, exec vp, managing dir. LA: Don Easdon, exec vp, creative dir; Chuck Kushell, exec vp, managing dir. Chicago: Pat Casale, exec vp, managing dir. London: Jennifer Laing, chmn-ceo. Hong Kong: Jimmy Hung, managing dir.

Headquarters

Hill, Holliday, Connors, Cosmopulos Inc.
200 Clarendon St.
Boston, Mass. 02116
Phone: (617) 437-1600
Fax: (617) 572-3534

RANK: 33

I&S Corp.

Tokyo
Gross income: **$94.7** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	94.7	83.2	13.9
Volume	770.2	692.9	11.2

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	817	850	(3.9)
Offices	9	9	0.0

Annual review

I&S predicts growth of 11% in billings in 1990 based on a stable consumer index and an expanding client/industry base resulting from the lifting of government control and self-imposed restrictions in Japan. During 1989, billings from new accounts grew by nearly $60 million as the agency experienced significant growth in media and sales promotion departments. The agency handled major exhibitions such as Asia Pacific Exhibition, Hiroshima Exhibition and Yokohama Exhibition and expanded in interior/exterior space design.

Officers

Masato Suzuki, president-ceo; Masaru Iwata, advisor; Kazuteru Yoshino, exec sr vp; Yo Kinoshita, exec vp; Masaaki Kurata, sr vp; Shigeo Yamashita, Masakazu Ito, Tetsuo Fukabori, Kinya Ozeki, Kiyoshi Takuhashi, vps.

Headquarters

I&S Corp.
5-3 Nihombashi, Muromachi 1-chome
Chuo-ku, Tokyo 103, Japan
Phone: 813-246-8780
Fax: 813-246-8792

RANK: 67

Italia/BBDO

Milan
Gross income: **$27.7** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	27.7	25.4	8.9
Volume	184.2	169.4	8.7

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	15	NA	NA

Annual review

Italia/BBDO, 40% owned by BBDO Worldwide, recorded an 8.7% increase in billings in 1989 and predicts growth of 20% this year, most coming from budget increases from existing clients. The agency in general holds between 50% and 80% equity in its various 14 Italian affiliates that cover advertising, pr, sales promotion, video communications, research and business-to-business.

Accounts

Gained: Rizzoli (weekly magazine), Einaudi (books), RAI (state television).

Lost: Hasbro.

Officers

Gianni Muccini, chmn; Mario Cardaro, genl mgr; Bruno Feriazzo, creative dir; Marilena Gallo, media dir; Ricardo Parravicini, group finance dir.

Headquarters

Italia/BBDO
Via Leopardi, 1
20123 Milano, Italy
Phone: 392-867-431
Fax: 392-869-0094

RANK: 53

Jordan, McGrath, Case & Taylor

New York
Gross income: **$38.5** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	38.5	38.5	0.0
Volume	315.0	300.0	5.0
U.S.			
Gross income	38.5	38.5	0.0
Volume	315.0	300.0	5.0

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	282	283	(0.4)
Offices	1	1	0.0

Annual review

During the last half of 1989, strong new account growth helped push overall billings up 5%. Gained during that stretch were the $15 million-$20 million Hasbro account for girls' toys, $12 million-$15 million Nestle Foods daytime network media buying and two Procter & Gamble accounts credited with $5 million in billings—all of which helped the agency overcome account departures worth $25 million in billings. In early 1990, Malcolm MacDougall, vice chairman, left to form his own consulting company with minority backing from the agency.

U.S. accounts

Gained: Reebok International Inc. (Rockport shoes); Quaker Oats Co. (Pritikin Systems); Hasbro Inc. (My Little Pony, new girls' toys); Milton Bradley Co. (Scattergories, Yahtzee, Memory, Trouble); Procter & Gamble (Top Job, Fisher Nuts, new prods).

Lost: Clorox (Deer Park Spring Water); Tonka Toys; Lehn & Fink (Chubs and Wet Ones); Borden (Wise); Ogden Allied.

Officers

James J. Jordan Jr., chmn; Patrick J. McGrath, president; John L. Taylor, exec vice chmn; Gene Case, sr vp.

Headquarters

Jordan, McGrath, Case & Taylor, Inc.
445 Park Ave.
New York, N.Y. 10022
Phone: (212) 326-9100
Fax: (212) 308-4984

RANK: 83

Keller-Crescent Co.

Evansville, Ind.
Gross income: **$21.3** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	21.3	22.0	(3.4)
Volume	106.5	110.3	(3.4)
U.S.			
Gross income	21.3	22.0	(3.4)
Volume	106.5	110.3	(3.4)

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	546	561	(2.7)
Offices	2	2	0.0

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Keller-Crescent Co., Dallas	18.4
Keller-Crescent Co., Evansville, Ind.	88.2

Annual review

Some $2.5 million in billings came in from new business, including FoxMeyer Drug Co. and its Health Mart subsidiary, to counter losses of $2.9 million in billings from departing clients. However, existing clients cut their billings by $3.3 million to leave the agency with a 3.4% billings decrease for the year.

U.S. accounts

Gained: Textron Aerostructures, Remco Enterprises Inc., S.B. International, Lexington Management Corp., Healthmart Inc., FoxMeyer.

Lost: W.F. Meyers, Monterey House, My Alarm, Thermos.

Officers

Thomas M. Smythe, president-ceo; Robert Hampel, exec vp-finance; F.A. Samuelson Jr., exec vp-creative; Fred D. Kitch, Jack Cohen, exec vps-client svcs; Del Graham, exec vp-prod and operating svcs; Miles Jackson, sr vp-mgmt super; Robert Ubelhor, vp-a/v operations; James Weitzel, vp-mktg svcs; Donald Minton, Michael Mayers, vps-mgmt supers; Thomas O'Conner, managing dir; Richard J. Wittgen, sr vp.

Headquarters

Keller-Crescent Co.
1100 E. Louisiana St.
Evansville, Ind. 47711
Phone: (812) 464-2461
Fax: (812) 426-7601

RANK: 29

Ketchum Communications

Pittsburgh
Gross income: **$117.8** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	117.8	109.9	7.1
Volume	915.7	776.0	18.0
U.S.			
Gross income	112.9	102.1	10.6
Volume	854.9	726.0	17.7

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	1,279	1,410	(9.3)
Offices	20	19	5.3

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Ketchum Advertising, Atlanta	11.7
Ketchum/Mandabach & Simms, Chicago	62.3

Six-year income & billings review for top 500 U.S. agencies

	Gross income						Billings					
Year	**Worldwide**	**% chg**	**U.S.**	**% chg**	**Foreign**	**% chg**	**Worldwide**	**% chg**	**U.S.**	**% chg**	**Foreign**	**% chg**
1989	$12,326.9	9.7	$7,291.8	6.8	$5,035.1	14.2	$85,404.2	9.5	$51,543.5	6.7	$33,860.7	14.0
1988	11,238.3	16.9	6,827.5	9.8	4,410.8	29.9	77,988.9	18.7	48,299.2	12.4	29,689.7	30.6
1987	9,613.1	11.1	6,217.7	(4.4)	3,395.4	58.2	65,702.4	10.8	42,971.2	(4.0)	22,731.2	55.9
1986	8,648.9	5.8	6,502.2	3.8	2,146.7	12.3	59,318.8	6.3	44,740.8	8.1	14,578.0	1.0
1985	8,174.6	14.7	6,262.2	18.7	1,912.4	3.2	55,805.5	15.2	41,371.8	15.3	14,433.7	15.0
1984	7,129.4	17.1	5,276.7	18.4	1,852.7	13.6	48,443.9	17.0	35,895.4	18.3	12,548.5	13.5

Notes: Dollars are in millions. Change is computed from previous years' figures, including 1983, not shown. All figures are constant, representing reporting by the top 500 agencies in the year given.

U.S. offices, location	**Billings**
Ketchum Advertising, Los Angeles	135.5
Ketchum Advertising, Louisville	10.8
Ketchum Advertising, New York	209.2
Ketchum Advertising, Philadelphia	63.0
Ketchum Advertising, Pittsburgh	111.9
Ketchum Advertising, San Francisco	227.2
Ketchum Advertising, Washington	23.3

Non-U.S. offices, location	**Billings**
Domino Ketchum, Paris(MN)	7.2
Durana Ketchum, Frankfurt(MJ)	8.6
Far East-Ketchum Advertising, Hong Kong(MN)	5.8
Ketchum/Japan, Tokyo(MJ)	25.7
Ketchum/Singapore, Singapore(MJ)	6.2
Kompleit Bord, Frankfurt(MN)	17.3

■ Annual review

Domestic growth at Ketchum slipped only slightly to 17.7% in billings in 1989 from 19% in 1988 as the agency continued to build a client base with new account wins: Southwestern Bell Yellow Pages ($12 million), the broadcast creative portion of Ross Stores ($8-$10 million), French Government Tourist Office ($4 million), and consolidation of the Melitta USA business ($10 million). Losses included Roman Meal ($5 million), Pizza Hut of Washington ($3-$5 million) and Poqet Computer Corp. ($4 million), which it gained and lost during the year. Ketchum formed an international pr joint venture with MPR Leedex, London. Last November Ketchum/Hicks & Greist became Ketchum Advertising, New York.

■ U.S. accounts

Gained: Southwestern Bell, Ross Dress for Less, Palomar Hospital, STOR, William & Clarissa, Thermador/Waste King, Melitta, Prudential Properties, Singer Sewing Machine, French Government Tourist.

Lost: Dakin, Roman Meal, Paragon Foods, Pizza Hut, *L.A. Herald Examiner*, Cullinet, Rohm & Haas, Gandolf.

■ Officers

William H. Genge, chmn-ceo, KCI; Gerald J. Voros, president-coo, KCI; Edward L. Graf, vice chmn-cfo, KFI; Paul Alvarez, president, Ketchum Specialized Services; John Fitzgerald, chmn, Ketchum Advertising/USA; Herb Gordon, exec vp-corp svcs; Robert W. Kroyer, president, Ketchum Advertising/USA; David Drobis, president, Ketchum Public Relations; Ken Dudwich, chmn, Ketchum Advertising/San Francisco; Lee Lippman, president, Ketchum/Mandabach & Sims/Chicago; J. Craig Mathiesen, president, Ketchum Advertising/Los Angeles; Thomas R. Miller, president, Ketchum Advertising/New York; Hank Seiden, ceo, Ketchum Advertising/New York; Sam Rand, president, Ketchum Advertising/Philadelphia; Tom Rich, president, Ketchum Advertising/Pittsburgh; Dianne Snedaker, president, Ketchum Advertising, San Francisco; James Larkin, exec vp, Ketchum Advertising/USA; Joseph M. Coogle, exec vp, Ketchum Specialized Services; Jan Hedquist, managing dir, Ketchum International Inc.

■ Headquarters

Ketchum Communications Inc.
Six PPG Place
Pittsburgh, Pa. 15222
Phone: (412) 456-3500
Fax: (412) 456-3834

RANK: 95

Korad Ogilvy & Mather

Seoul
Gross income: **$18.8** million

■ Income & volume ($ in millions)

Worldwide	**1989**	**1988**	**% chg**
Gross income	18.8	14.4	30.8
Volume	118.9	90.5	31.4

■ Workforce & facilities

Worldwide	**1989**	**1988**	**% chg**
Employees	NA	NA	NA
Offices	NA	NA	NA

■ Annual review

Billings grew 31.4% at Korad, largely from substantial new account gains. Korad, an agency 30% owned by the Ogilvy Group (itself owned by WPP Group PLC), operates an interior animation unit among its services.

■ Accounts

Gained: Cealin Asia chemicals, Sun Micro System computer, SEA Land transportation, Peeres cosmetics, Digital Korea computer, Philips electronics.

Lost: Prince blanket, Hanla Sports, Bowon magnetic products, Robocom toys, Ottogi Food instant noodles.

■ Officers

C.S. Park, ceo; M.H. Kim, managing dir; I.P. Kwan, head of creative; I.S. Shin, head of media; C.K. Kim, M.Y. Lee, heads of accts svcing.

■ Headquarters

Korad Ogilvy & Mather
Kukje Center Bldg. 10th Flr.
191 2 Ka Han Gang-ro, Seoul, South Korea
Phone: 822-796-8505
Fax: 822-793-7888

RANK: 58

Kyodo Advertising

Tokyo
Gross income: **$35.3** million

■ Income & volume ($ in millions)

Worldwide	**1989**	**1988**	**% chg**
Gross income	35.3	35.4	(0.1)
Volume	265.6	270.0	(1.6)

■ Workforce & facilities

Worldwide	**1989**	**1988**	**% chg**
Employees	392	398	(1.5)
Offices	11	11	0.0

■ Annual review

Kyodo expects growth of 15% in billings in 1990 following a narrow 1.5% gain in yen in 1989. Optimistic projections are based on the development of new media, greater use of local TV and media events and new account development.

■ Accounts

Gained: Fuji Express (railway, hotel), Japan Emba (import fur sales), Komatsu (forklifts), Taka Q. (fashion), Nihon Mines (metal/oil).

Lost: Ivy (cosmetics), Nisshin (travel), Nichiro Fishery.

■ Officers

Seiya Sekiguchi, president; Yoshimasa Abe, exec managing dir; Susumu Ohashi, Shigeki Tadano, managing dirs; Directors—Tatsuo Kohno, Takahashi Sugita, Naotoshi Takada, Taiji Takeya, Yohsuke Obana, Nobuo Ichikawa, Hiroshi Kudoh.

■ Headquarters

Kyodo Advertising Co. Ltd.
Hibiya Chunichi Bldg., 2-1-4
Uchisaiwaicho, Chiyoda-ku
Tokyo 100, Japan
Phone: 813-503-1311
Fax: 813-580-9065

RANK: 60

Laurence, Charles, Free & Lawson

New York
Gross income: **$34.6** million

■ Income & volume ($ in millions)

Worldwide	**1989**	**1988**	**% chg**
Gross income	34.6	41.5	(16.5)
Volume	275.2	302.0	(8.9)
U.S.			
Gross income	34.6	41.5	(16.5)
Volume	275.2	302.0	(8.9)

■ Workforce & facilities

Worldwide	**1989**	**1988**	**% chg**
Employees	322	334	(3.6)
Offices	5	5	0.0

■ Annual review

New business from Econo Lodges of America ($5 million) and increased spending from existing clients Clairol (Option, $5 million) and American Tobacco (Misty, $6 million, and American Lights, $2 million) wasn't enough to prevent an 8.9% decline in billings traced largely to the departure of the Thompson Medical account ($20 million). The agency predicts 2% revenue growth for 1990. LCFL is one of the three advertising arms of Lowe Group, London.

■ U.S. accounts

Gained: Econo Lodges of America, Clairol (Option), American Tobacco (Misty, American Lights).

Lost: Thompson Medical.

■ Officers

Charles Goldschmidt, chmn, exec comm; Thomas E. Lawson, president-ceo; Laurence D. Dunst, chmn; F. William Free, Martin Smith, vice chmn; Alfred L. Evans Jr., Frank Macina, Alfred Magnane, exec vps-mgmt supers; Paul Hodges, Dan Franklin, exec vps-creative dirs; Todd Middleton, exec vp-business devel; Fred Turdik, exec vp-dir operations.

■ Headquarters

Laurence, Charles, Free & Lawson
260 Madison Ave.
New York, N.Y. 10016
Phone: (212) 213-4646
Fax: (212) 213-6710

RANK: 56

Levine, Huntley, Schmidt & Beaver

New York
Gross income: **$37.1** million

■ Income & volume ($ in millions)

Worldwide	**1989**	**1988**	**% chg**
Gross income	37.1	32.1	15.7
Volume	250.3	216.4	15.7
U.S.			
Gross income	37.1	32.1	15.7
Volume	250.3	216.4	15.7

■ Workforce & facilities

Worldwide	**1989**	**1988**	**% chg**
Employees	245	250	(2.0)
Offices	6	6	0.0

■ Annual review

The agency anticipates a growth rate of 20% in 1990 spurred in part by growth from new accounts in 1989. New account growth for the year hit $21.2 million and included $12 million from Trump Taj Mahal. Existing accounts added an additional $29.7 million in billings to more than offset the departure of $17 million in business, including the Citizen Watch account. The agency is a subsidiary of Grey Advertising, but its returns are not included in Grey's totals.

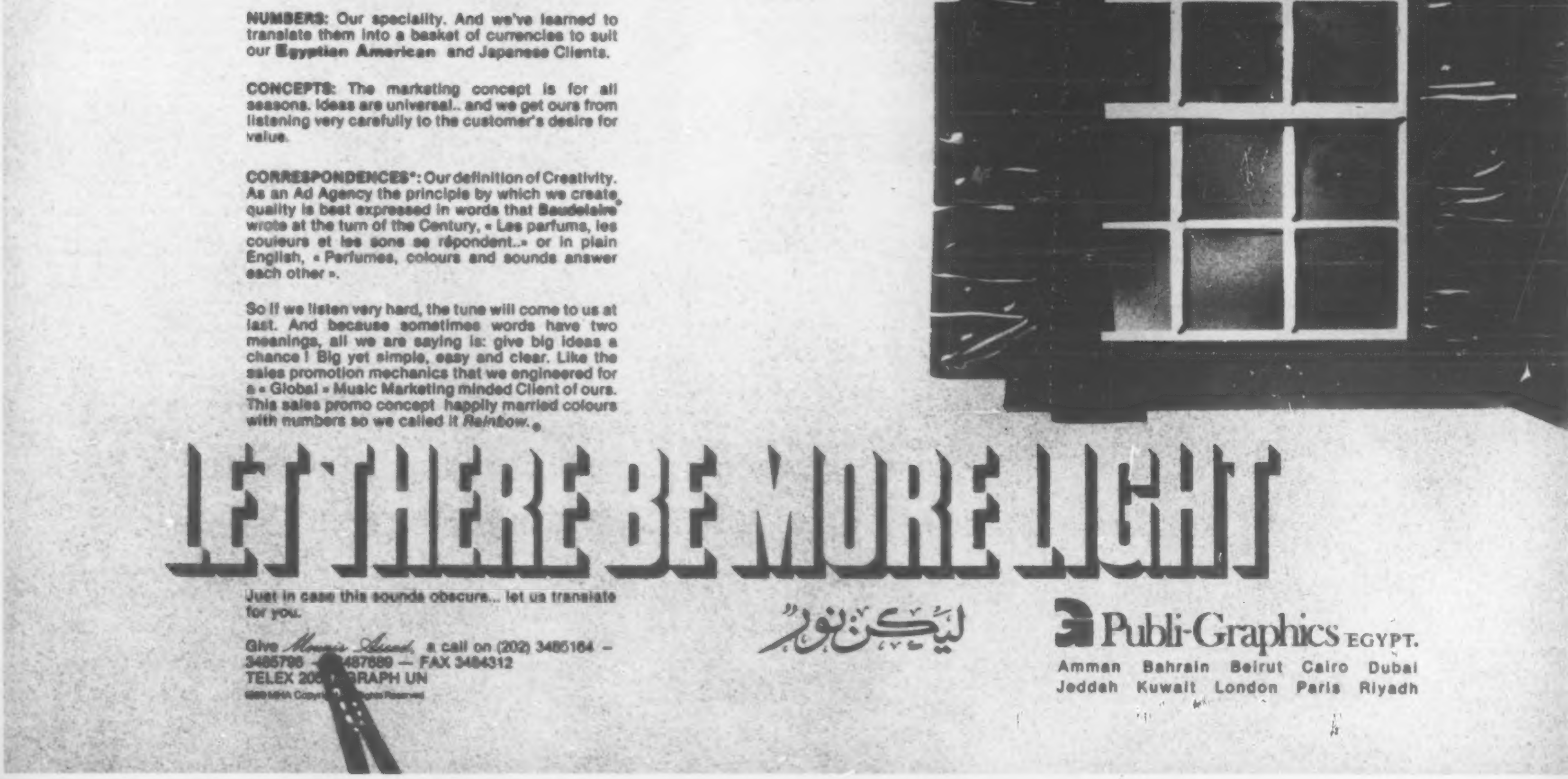
■ U.S. accounts

Gained: Ethan Allen (furniture); Frito Lay (salty snacks); Schering (new prods); Trump Taj Mahal (casino); Bausch & Lomb (Ray Ban); Ralston Purina (new prods).

Lost: Citizen Watch Co.

■ Officers

Robert H. Schmidt, chmn-president-ceo; Harold Levine, chmn-exec committee; Allan Beaver, vice chmn-dir creative svcs; Terry Bonaccolta, exec vp-dir new business; James F. Brandhorst, Jr., exec vp-mgmt dir, Anthony DeGregorio, exec vp-creative dir; James Dragoumis, exec vp-dir acct svcs; Jane Pack, exec vp-dir strategic svcs; Len Sternbach, exec vp-dir operations; Jean L. Bergin, sr vp-mgmt super; Matthew R. Bud, sr vp, finance-cfo; Alan Chalfin, sr vp-assoc creative dir; Michael M. Moore, sr vp-dir



COLOR: A creative source of energy. Blue, Glade Jasmin white, HALLS Cherry red- always perceived differently. They are the kind of images, fragrances and flavours that we at Publi-Graphics love to expose you to.. and whether infra red or ultra violet we're the kind of Ad Agency that can take the heat.

NUMBERS: Our speciality. And we've learned to translate them into a basket of currencies to suit our Egyptian American and Japanese Clients.

CONCEPTS: The marketing concept is for all seasons. Ideas are universal.. and we get ours from listening very carefully to the customer's desire for value.

CORRESPONDENCES*: Our definition of Creativity. As an Ad Agency the principle by which we create quality is best expressed in words that Baudelaire wrote at the turn of the Century, « Les parfums, les couleurs et les sons se répondent..» or in plain English, « Perfumes, colours and sounds answer each other ».

So if we listen very hard, the tune will come to us at last. And because sometimes words have two meanings, all we are saying is: give big ideas a chance ! Big yet simple, easy and clear. Like the sales promotion mechanics that we engineered for a « Global » Music Marketing minded Client of ours. This sales promo concept happily married colours with numbers so we called it *Rainbow*.

Just in case this sounds obscure... let us translate for you.

Give Mounir Assaad, a call on (202) 3485164 – 3485796 – [illegible]487689 — FAX 3484312
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Publi-Graphics EGYPT.
Amman Bahrain Beirut Cairo Dubai
Jeddah Kuwait London Paris Riyadh

Public relations' influence on top 10 global agencies

Rank w/out PR	Rank with PR	Agency	Worldwide gross income without PR	Agency PR company	Public relations fees	W'wide gross income
1	1	Dentsu Inc.	$1,316.4	Dentsu PR	NA	$1,316.4
2	2	Saatchi & Saatchi Advertising Worldwide	890.0	Rowland Cos.[1]	41.9	890.0
3	3	Young & Rubicam	805.2	Burson-Marsteller[2]	184.2	865.4
4	4	Backer Spielvogel Bates Worldwide	759.8		NA	759.8
5	5	McCann-Erickson Worldwide	715.5		NA	715.5
6	7	BBDO Worldwide	656.6		NA	656.6
7	6	Ogilvy & Mather Worldwide	642.7	Ogilvy & Mather PR	57.0	699.7
8	8	J. Walter Thompson Co.	626.4	Hill & Knowlton[3]	170.0	626.4
9	9	Lintas:Worldwide	593.3		NA	593.3
10	10	Hakuhodo Inc.	585.5		NA	585.5

Notes: Dollars are in millions. [1] Rowland Cos. is part of Saatchi & Saatchi PLC. [2] Y&R includes $124 million (media-related) fees of Burson-Marsteller in its returns; $60.2 million of B-M's fees are purely PR. [3] H&K is an autonomous unit of WPP.
Source: PR fee totals were provided by agencies. AA accepts PR as part of an advertising total if the unit is not considered an autonomous unit by the agency.

of strategic svcs; Robert A. Nelson, sr vp-exec producer; Kenneth A. Paster, sr vp-mgmt super; Nathan A. Russo, sr vp-assoc creative dir; Philip Sklar, John T. Wheaton, sr vps-mgmt supers; Michael Vitiello, sr vp-assoc creative dir.

■ Headquarters

Levine, Huntley, Schmidt & Beaver, Inc.
355 Park Ave. South
New York, N.Y. 10010-1799
Phone: (212) 545-3500
Fax: (212) 779-1763

RANK: 73

L.G. Ad

Seoul
Gross income: **$24.1** million

■ Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	24.1	19.0	26.6
Volume	160.7	126.9	26.6

■ Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

■ Annual review

Heavy account wins pushed billings up 14.3% (in Korean won) and should help the Seoul agency attain its projected 17.4% increase in billings in 1990. LG is a non-equity affiliate of BBDO Worldwide.

■ Accounts

Gained: Korea Machauer (apparel), Magazine House Co. (magazine), Seoul Cultural Co. (magazine), Seoul Dairy, Saehan Pharmaceuticals, ISS (apparel), Shinhan Intl (apparel), E-Land Co. (apparel), Sewoo Polymer (furniture), Anjin Pharmaceuticals, Ilwha Textile, Booto Co. (poultry), Dongbu Group (autos), Chunho Integration (poultry), Daewan Hwasung Co. (footwear), *Naeway Economic Daily*, Sampoong Department Store.

Lost: Esquire (apparel/footwear), KLM, Green House (entertainment), Kyunglim Co. (apparel).

■ Officers

Jwa-Hyon Youn, president; Choon-Toek Lim, head of creative; Seung-Eun Park, head of media; Chang-Son Park, head of accts svcs.

■ Headquarters

LG Ad Inc.
Lucky-Goldstar Mapo Building
275 Gongdeok-dong, Mapo-gu
Seoul, Korea
Phone: 822-701-1505
Fax: 822-701-1510/1610

RANK: 9

Lintas:Worldwide

New York
Gross income: **$593.3** million

■ Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	593.3	537.6	10.4
Volume	3,957.6	3,585.6	10.4
U.S.			
Gross income	224.9	201.7	11.5
Volume	1,499.9	1,345.4	11.5

■ Workforce & facilities

Worldwide	1989	1988	% chg
Employees	6,034	6,372	(5.3)
Offices	135	122	10.7

■ Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Lintas:CECO, Warren, Mich.	NA
Lintas:MCM/Direct, New York	NA
Fahlgren & Swink, Parkersburg, W. Va.	161.9
Lintas:USA, Chicago	3.7
Lintas:USA, Los Angeles	34.2
Lintas:USA, Miami	23.3
Lintas:New York, New York	771.4
Lintas:Campbell-Ewald, Warren, Mich.	667.4

Non-U.S. offices, location	Billings
Colonnese:Lintas, Buenos Aires(MJ)	78.0
Grafika:Lintas, Istanbul(MN)	13.1
Graphic:Lintas Malawi, Blantyre, Malawi(MN)	1.9
Hakuhodo:Lintas, Tokyo(JV)	71.6
Lintas/GR:Denmark, Copenhagen(MJ)	50.8
Lintas: Hong Kong, Hong Kong(MJ)	16.6
Lintas:Abidjan, Abidjan, Ivory Coast(MJ)	10.3
Lintas:Athens, Athens(MJ)	23.8
Lintas:Australia, Sydney(MJ)	81.[illegible]
Lintas:Austria, Vienna/Salzburg(MJ)	50.8
Lintas:Brussels, Brussels(MJ)	56.4
Lintas:Cameroon, Douala, Cameroon(MN)	NA
Lintas:Chile, Santiago(MJ)	11.5
Lintas:Colombia, Bogota(MJ)	4.1
Lintas:Germany, Hamburg(MJ)	349.0
Lintas:Helsinki, Helsinki(MJ)	47.7
Lintas:India, Bombay(MN)	53.4
Lintas:Make Direct Oy, Helsinki(MJ)	14.3
Lintas:Malaysia, Kuala Lumpur, Malaysia(MJ)	12.5
Lintas:Manila, Manila(MN)	10.6
Lintas:Mexico, Mexico City(MJ)	9.6
Lintas:Milano, Milan(MJ)	124.4
Lintas:Namibia, Klein Windhoek, Namibia(MJ)	0.6
Lintas:Netherlands, Amsterdam(MJ)	118.8
Lintas:New Zealand, Auckland(MJ)	20.6
Lintas:Paris, Paris(MJ)	284.0
Lintas:Portugal, Lisbon(MJ)	37.2
Lintas:Singapore, Singapore(MJ)	11.4
Lintas:South Africa, Johannesburg(MJ)	42.2
Lintas:Spain, Madrid(MJ)	164.7
Lintas:Sweden, Stockholm(MJ)	27.9
Lintas:Taiwan, Taipei(MJ)	16.4
Lintas:Thailand, Bangkok(MJ)	48.0
Lintas:Zimbabwe, Harare, Zimbabwe(MJ)	6.2
Lintas:Zurich, Zurich(MJ)	37.8
MacLaren:Lintas, Toronto(MJ)	188.3
Myres/Lintas, Oslo(MJ)	33.8
P.T. Citra:Lintas, Jakarta(NE)	23.6
R:Lintas, Karachi, Pakistan(NE)	7.9
SPCTD:Lintas, London(MJ)	138.4

■ Annual review

Steady gains, amid the tough loss of the $55 million Noxell Corp. account, pushed Lintas' billings up 10.4%, although far behind 1988's 28.6% pace. Procter & Gamble bought Noxell in September and pulled it from Lintas, after 40 years of service, due to conflict of interest with Unilever. Eastern Airlines' bankruptcy in August mandated serious cuts in planned 1989 advertising, and, along with reduction in other existing clients' budgets, forced layoffs in New York. Also, the Michigan office lost Bridgestone USA's $10 million account in August. Existing clients rounded up substantial business: GM Chevrolet consolidated national advertising for Geo ($35 million) at the Michigan shop, which also drew an assignment from IBM to develop retail tactical marketing programs ($15 million-$20 million). Martlet Importing awarded its Molson Beer account ($10 million) to the New York shop, also the recipient of Unilever's Brut 33 account ($9 million). Australia drew Unilever's Unifoods subsidiary media buying account ($40 million) and France won SGEM Vittel ($10 million). In January 1990, the Toronto shop gained GM Corp.'s Canadian media buying account ($51 million), and worldwide creative responsibility of Diet Coke was consolidated with Lintas:WW, which picked up the overseas portion previously handled by McCann-Erickson, Lintas' sister agency in parent Interpublic. Eyeing the international market, it opened Lintas:Integrated Marketing Communications in Bangkok in April, with plans to expand throughout Southeast Asia. In June, Still Price Court Twivy D'Souza was bought and combined with Lintas' U.K. office. Lintas Marketing Communications was set up to encompass all non-media units in the U.S. In consolidating its worldwide management in the U.S., Kenneth Robbins, chairman-ceo of Lintas:International and deputy chairman of Lintas:WW, moved to New York from London. Separately, Barry Day moved to Lintas:WW as vice chmn-dir international advertising development after 18 years with McCann.

■ U.S. accounts

Gained: Lintas: New York—Lipton soup mixes, Inter-Continental, Martlet's Molson Beer, Unilever's Faberge fragrances and Brut, Fieldcrest Cannon, Johnson & Johnson KY Jelly. Lintas:MCM/Direct—Applied Graphics, Commerce Clearing House, Fieldcrest Cannon, IBM's ACIS college program, Johnson & Johnson's Vistakon/Acuvue, Phillips-Van Heusen Profile stores, T.J. Lipton Beverage div, Paine Webber Mitchell Hutchins mutual funds. Lintas: Campbell-Ewald (including CECO)—Meineke Discount Muffler shops, AC Rochester auto components; Domino's Pizza chain (intl), General Motors' California Geo, Johnson & Johnson's Acuvue/Tactical mktg, RJR Nabisco's Life savers, IBM computers/tactical mktg, MasterCard, McLouth Steel. Fahlgren & Swink—McDonald's (Southeast, Southwest and Palm Beach Florida Co-ops); Tampa Bay Performing Arts Center; Jewel Osco; GTE Mobilnet; ARVIDA luxury home community; State of West Virginia-Tourism, Impact Resources.

Lost: Lintas:New York—Motorola Corp; Johnson & Johnson first aid kit; Noxell Cover Girl/Noxzema. Lintas:MCM/Direct—Encyclopaedia Britannica, Carteret Savings Banks. Lintas:Campbell-Ewald (including CECO)—Bridgestone Tires. Fahlgren & Swink—Volvo GM, Trustcorp, Worthington Foods, Quaker State-Southeast.

■ International accounts

Gained: Alitalia—Australia, India, Singapore; Casio watches—Austria; Citicorp—Indonesia (Citibank Visa), Thailand (Citibank Visa); Citizen Watches—Italy; Fiat—Italy (Selenia Oil), Switzerland (cars); Inter-Continental Hotel—Canada, Colombia, Mexico, Indonesia, Philippines; NEC—Austria (computer/media), Turkey (facsimile), Mexico (corp); Rowntree Mackintosh—England (Montego); SmithKline Beecham—South Africa.

Lost: Alitalia—Hong Kong (regional acct); Citicorp—Singapore (Citibank); Citizen Watches—England; Inter-Continental Hotel—France, Greece; Noxell—Canada; Philips—England (consumer div), France, Canada; RCA/Columbia—Spain (videotapes); SEB Tefal—France.

■ Officers

Lintas:Worldwide—William V. Weithas, chmn-ceo; Kenneth L. Robbins, deputy chmn, chmn-ceo, Lintas International. Lintas:USA—William V. Weithas, chmn; Richard D. O'Connor and Spencer Plavoukos, vice chmns; Jan T. L. Homan, exec vp-dir strategic planning & rsch; Donald A. Peppers, exec vp-business devel; Louis M. Schultz, exec vp-dir media svcs. Lintas:New York—Spencer Plavoukos, chmn-ceo; Francis J. DeVito, president-dir creative svcs; William A. Overlock, exec vp-admin & finance; Group exec vps—Stephen W. Norcia, F. Stone Roberts, Terry L. Rosenquist; Thomas J. Turner, exec vp-dir mktg. Lintas:Campbell-Ewald—Richard D. O'Connor, chmn-ceo; Peter A. Dow, president-coo; Exec vps—Robert P. Roselle, cfo; Robert H. Schirmer, group dir client svcs; Ronald W. Mitchell, dir agency planning; Anthony J. Hopp, Chevrolet acct dir; Deborah A. Karnowsky, creative dir general accts; William J. Ludwig, creative dir Chevrolet; Dennis H. Plansker, dir broadcast svcs. Lintas:CECO—James I. Bernardin, chmn-ceo; Frank E. Hoag Jr., president-coo. Lintas:Muir Cornelius Moore—William P. Muir, chmn-ceo; James Cornelius, vice chmn-dir corp devel; Richard Moore, vice chmn-chief creative officer. Fahlgren & Swink—H. Smoot Fahlgren, chmn-ceo; William J. Farson, treasurer-cfo; James W. Swearingen, vice chmn-coo.

■ Headquarters

Lintas:Worldwide
One Dag Hammarskjold Plaza
New York, N.Y. 10017
Phone: (212) 605-8000
Fax: (212) 605-8569

RANK: 25

Lowe International

London
Gross income: **$137.8** million

■ Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	137.8	NA	NA
Volume	918.6	NA	NA
U.S.			
Gross income	42.0	NA	NA
Volume	279.9	NA	NA

■ Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

■ Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Lowe Marschalk, New York	275.0
Lowe Tucker Metcalf, New York	27.0

Non-U.S. offices, location	Billings
Campbell Ewald, Vienna(MJ)	0.2
GJW, London(MJ)	23.7
Hertz Walpole, Sydney(MN)	23.7
International Poster Management, London(MJ)	12.4
Lowe Bell Communications, London(MJ)	148.5
Lowe Canada/Deacon Day, Toronto(JV)	23.4
Lowe Des Per Des, Barcelona(MJ)	24.6
Lowe Howard-Spink, London(MJ)	286.8
Lowe Luerzer, Frankfurt(MJ)	122.6
Lowe Nederland, Amsterdam(MJ)	8.1
Lowe Quadrillage, Boulogne, France(MN)	21.2
Lowe Troost, Brussels(MJ)	46.1
Pirella Goettsche Lowe, Milan(MJ)	118.0
Services Division, London(MJ)	24.7
The Wight Co., London(MJ)	12.6

■ Annual review

Lowe International, a network of international agencies owned by Lowe Group PLC holding company, was led in the billings race by Lowe Howard-Spink, U.K., its leading U.K. unit which gained more than $85 million in new business. The leading U.S. shop, Lowe Marschalk, pulled in the Prudential U.S. account worth $70 million, although its total billings declined by 15.4%. The Italian agency, Pirella Gottsche Lowe, gained more than $50 million in new accounts, including Braun. The network also grew through acquisition: Homer & Durham in the U.S. (folded into Lowe Tucker Metcalf), the remaining stock in Lowe Marschalk and 49% of Deacon Day Advertising, Canada. Lucinda Holmes became president of Lowe International in February 1990.

■ U.S. accounts

Gained: Lowe Marschalk: Braun appliances, Citibank card, Lehn & Fink, Hong Kong & Shanghai Bank. Lowe Tucker Metcalf: Avis lube.

Lost: Lowe Marschalk: Johnson & Johnson (Sucralose), Colombo, Ponderosa.

■ Other network accounts

Gained: Henkel—Germany, France, Italy, Netherlands, Spain; Benetton—Italy (Sisley)—U.S., Europe, Canada, Argentina; Bristol-Myers Squibb. Mum—Germany; Ferrero Rocher (Raffaelo)—Germany; Interbrew—Belgium, France, Netherlands, Spain (Stella Artois); Hoover—UK, Italy, France, Benelux; Searle—three European markets and Canada (Canderel); also Visa—Belgium; Tesco supermarkets, National Power Co., United Biscuits (Terry's of York), Weetabix cereal, Sky TV and Reebok sports shoes—all UK; Toshiba fax/computers, Parker pens—Spain.

Lost: UDG (Gordons Gin)—UK

■ Officers

Frank Lowe, chmn-Lowe Group PLC & Lowe Intl; Lucinda Holmes, president-Lowe Intl

■ Headquarters

Lowe International
Bowater House
68-114 Knightsbridge
London SW1X 7LT
Phone: 441-584-5033
Fax: 441-581-5742

RANK: 49

Man-Nen-Sha Inc.

Osaka, Japan
Gross income: **$42.2** million

■ Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	42.2	36.4	15.9
Volume	550.4	492.9	11.7

■ Workforce & facilities

Worldwide	1989	1988	% chg
Employees	464	472	(1.7)
Offices	11	11	0.0

■ Annual review

The agency, which recorded year-to-year billings growth of 11.7% in 1989, expects growth in 1990 to hit 13% as ad expenditures keep pace with economic growth in Japan where its business is concentrated, and as a number of special events—including the International Gardens and Greenery Exposition '90—stimulate advertising activity.

■ Accounts

Gained: Japan Railways (Tokai), Japan Railways West Japan Bus, Esso oil, Sanwa Homes.

■ Officers

Tsuneji Higaki, chmn; Osamu Hirokawa, president; Makoto Fukui, sr managing dir; Chozo Imanishi, Yukio Hayashi, managing dirs.

■ Headquarters

Man-Nen-Sha Inc.
5-13, Awajimachi 1-Chome
Chuo-ku, Osaka 541, Japan
Phone: 816-202-2212
Fax: 816-227-1651

RANK: 5

McCann-Erickson Worldwide

New York
Gross income: **$715.5** million

■ Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	715.5	656.8	8.9
Volume	4,772.3	4,381.0	8.9
U.S.			
Gross income	209.1	197.0	6.1
Volume	1,394.8	1,314.0	6.1

■ Workforce & facilities

Worldwide	1989	1988	% chg
Employees	9,028	8,606	4.9
Offices	149	144	3.5

■ Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
McCann Direct, New York	40.0
McCann Healthcare, Chicago	53.0
McCann-Erickson Worldwide, Atlanta	48.8
McCann-Erickson Worldwide, Detroit	154.0
McCann-Erickson Worldwide, Houston	87.0
McCann-Erickson Worldwide, Los Angeles	115.0
McCann-Erickson Worldwide, New York	558.0
Phillips-Ramsey, Phoenix	21.0
Phillips-Ramsey, San Diego	34.0
McCann-Erickson Worldwide, San Francisco	134.0
McCann-Erickson Worldwide, Seattle	30.0

Non-U.S. offices, location	Billings
ABC-McCann Publicidad, Caracas(MJ)	18.1
Dobbs-Wiggins McCann-Erickson, Auckland(MJ)	18.0
McCann-Erickson Belgium, Brussels(MJ)	101.6
M-E Centroamericana, San Jose(MJ)	8.1
M-E Centroamericana, San Salvador(MJ)	4.6
M-E Centroamericana, Tegucigalpa, Honduras(MJ)	6.0
McCann-Erickson de Panama, Panama City(MJ)	3.4
McCann-Erickson DeVilliers, Johannesburg(MJ)	43.3
McCann-Erickson Dominicana, Santo Domingo(MJ)	5.9
McCann-Erickson Finland, Helsinki(MJ)	91.6
McCann-Erickson France, Paris(MJ)	213.5
McCann-Erickson Germany, Frankfurt(MJ)	297.2
McCann-Erickson Hellas, Athens(MJ)	15.2
McCann-Erickson Hungary, Budapest(MJ)	1.3
McCann-Erickson Italiana, Milan(MJ)	254.1
McCann-Erickson Japan, Tokyo(MJ)	618.4
McCann-Erickson Jardine, Beijing(MJ)	7.2
McCann-Erickson Kenya, Nairobi(MJ)	6.1
McCann-Erickson Malaysia, Kuala Lumpur, Malaysia(MJ)	22.0
McCann-Erickson Nederland, Amsterdam(MJ)	61.2
McCann-Erickson Pars, Istanbul(MJ)	20.8
McCann-Erickson Singapore, Singapore(MJ)	26.7
McCann-Erickson Sweden, Stockholm(MJ)	53.3
McCann-Erickson Switzerland, Geneva/Zurich(MJ)	56.8
McCann-Erickson S.A. Group, Madrid(MJ)	177.6
McCann-Erickson Tara Sinha, New Delhi(NE)	3.6
McCann-Erickson Thailand, Bangkok(MJ)	14.5
McCann-Erickson Trinidad, Port of Spain, Trinidad(MJ)	13.7
McCann-Erickson U.K., London(MJ)	400.4
McCann-Erickson (Taiwan), Taipei(MJ)	40.7
McCann-Erickson, Toronto(MJ)	194.3
McCann-Erickson, Asuncion, Paraguay(MJ)	0.3
McCann-Erickson, Bogota(MJ)	19.1
McCann-Erickson, Buenos Aires(MJ)	61.7
McCann-Erickson, Copenhagen(MJ)	15.6
McCann-Erickson, Guayaquil, Ecuador(MJ)	7.6
McCann-Erickson, Hong Kong(MJ)	28.3
McCann-Erickson, Kingston, Jamaica(MJ)	8.5
McCann-Erickson, Lima(MJ)	11.9
McCann-Erickson, Manila(MJ)	25.8
McCann-Erickson, Mexico City(MJ)	54.7
McCann-Erickson, Montevideo, Uruguay(MJ)	2.2
McCann-Erickson, San Juan(MJ)	23.7
McCann-Erickson, Santiago(MJ)	24.4
McCann-Erickson, Sydney(MJ)	134.2
McCann-Erickson, Vienna(MJ)	32.5
McCann-Erickson/Hora, Lisbon(MJ)	57.7
Publicidad McCann-Erickson, Guatemala City(MJ)	9.3
Reklamens Hus/McCann, Oslo(MJ)	18.3

■ Annual review

After two years of 20%-plus billings growth, McCann dipped to 8.9% growth as Shearson Lehman Hutton ($20 million), American Express Gold Card ($25 million) and R.J. Reynolds Tobacco Co.'s Camel and Winston domestic accounts ($55 million) exited. Gains from Nestle Food Corp.'s Taster's Choice ($24 million), consolidation of Nestle's $56 million U.K. grocery division at McCann and three new assignments from American Home Products relieved losses. Overseas volume, which traditionally accounts for about 70% of its billings, grew 10.1%, off from growth of 31% in 1988. McCann continued its international expansion by purchasing majority stake in a West German agency and opening Universal de Medios in Madrid, its first Spanish media-buying company. The new unit helped bring in new global accounts, among them Agfa Photo retail division, Europcar Car Rental, Lufthansa in SE Asia and Nabisco Brands cracker and snack advertising in the U.K. In Europe, McCann created Europe McCann Direct, a consolidation of its 14 direct-marketing offices there with combined $55 million billings. McCann plans to open an agency in the Soviet Union in April, 1990, and is seeking joint ventures in Poland and Czechoslovakia. In Canada, 51% of McCann/Foster was sold to former owners so the shop—now Foster Advertising—could retain its $8.5 million in government business. Among personnel changes, Sean Fitzpatrick, creative director behind Lintas' "Heartbeat of America" Chevrolet campaign, moved to McCann as vice chairman-chief creative officer, and Mike Ferrier succeeded Jerry Shively as chairman in London. Chairman-CEO Robert James added the title of president when John McNamara stepped down in January.

U.S. accounts

Gained: Atlanta—Diversified Products, American Family Life, American Express travel vacations, Six Flags Over Georgia. Detroit—Champion Spark Plug sales promo, General Motors direct mktg. Houston/Dallas—McDonald's Shreveport/Texarkana, Exxon NASCAR Racing, First City Bancorp cash mgmt. Los Angeles—Sea Galley media buying, Hilton, California Buick. New York—Nestle's Taster's Choice, Fidelity Investments, Brooks Brothers, Mennen Home Expressions Group. San Francisco—Safeway, Poqet Computer, Chevron Fire Flakes. Seattle—Roman Meal bread, Alaska Seafood marketing institute, Ernst Home Centers. McCann Direct—India Tourist Board, Gillette Waterman pens. McCann Healthcare (Chicago)—Mennen Baby Magic and MAPS, Marion Labs' Pentasa. Phillips-Ramsey (Phoenix)—Doubletree Hotel, Greater Phoenix Economic Council. Phillips-Ramsey (San Diego)—Scripps Clinic & Research.

Lost: Atlanta—Tru Green lawn care. Houston/Dallas—Gemcraft Homes. New York—R.J. Reynolds cigarettes, American Express Gold Card, Shearson Lehman Hutton. Seattle—Rainier Bancorp. McCann Direct—American Express Gold Card. McCann Healthcare (Chicago)—G.D. Searle sale substitute. Phillips-Ramsey (Phoenix)—Del Webb real estate.

International accounts

Gained: Agfa—Austria, Belgium, Denmark, England, Finland, Germany, Greece, Italy, Netherlands, Spain, Sweden; American Express—Hong Kong (bank, travel); Braun—England/Harrison; Buitoni—England; CPC—Spain (Horniman's Tea), Europcar (auto rental)—Germany, Portugal, Sweden; General Motors—Taiwan (corp); Gillette (Waterman pens)—Belgium, Goodyear-El Salvador (tires), Henkel—Turkey (Persil); Levi Stauss—Chile (jeans); L'Oreal—Panama (Studio Line), Hong Kong; Lufthansa Airline—Australia, Hong Kong, Philippines, Taiwan; Mennen-Mexico, Panama; Sterling Drugs—Jamaica, Trinidad; UPS-Finland, Japan; Sony—Spain; WD-40—Australia, England/Harrison, New Zealand.

Lost: Henkel—France (Le Chat detergent), Germany, Netherlands; General Motors—Venezuela (corp); Goldcorp—Australia, Hong Kong; Olivetti—Austria, England, Italy, Portugal, Switzerland.

Officers

Robert L. James, chmn-president; John F. Bergin, vice chmn; Marcio M. Moreira, vice chmn-chief creative officer, intl; Eugene H. Kummel, chmn emeritus. Exec vps Worldwide—Peter O. Hamilton, Bohdan I. Kurylko, Michael A. Sennott, John Bradbury; Gianni A. Cottardo, regional dir-Europe; Max Cusnir, regional dir-Asia/Pacific; John J. Dooner, president-North America; Michael C. Ferrier, regional dir-Europe; Jens Olesen, regional dir-Latin America; Koji Oshita, president, McCann-Erickson Hakuhodo.

Headquarters

McCann-Erickson Worldwide
750 Third Ave.
New York, N.Y. 10017
Phone: (212) 697-6000
Fax: (212) 867-5170

Euromedia buying's meteoric rise

Saatchi & Saatchi PLC set up Zenith Media in response to the ad/media separation trend in Europe. Not to be outdone, WCRS bought all of Carat In-

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RANK: 78

McKim Advertising

Toronto
Gross income: **$22.6** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	22.6	22.1	2.7
Volume	151.1	147.2	2.6

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

Annual review

McKim reported a 2.6% growth in billings in its consolidated totals, which included returns for subsidiaries Lowe Case Associates, Toronto, and V.R.H. Communications, Vancouver. Midyear, Ayer acquired 40% of the Spectrum Group Ltd. of Toronto, which owns McKim.

Accounts

Gained: Family Channel, Emerson Electronics, Rorer Pharmaceutical, B.C. StenaLine, Greek National Tourist Organization.

Lost: Dairy Bureau of Canada, Gov't of Ontario.

Officers

J.M. Anderson, president-ceo.

Headquarters

McKim Advertising Ltd.
2 Bloor St. West
Toronto, Ontario, Canada M4W 3R6
Phone: (416) 960-1722
Fax: (416) 960-1531

RANK: 63

Meitsu Inc.

Tokyo
Gross income: **$32.0** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	32.0	31.0	3.2
Volume	213.1	193.5	10.1

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	260	260	0.0
Offices	7	7	0.0

Annual review

New client growth is expected to boost billings in 1990 by 15%, slightly better than Meitsu's 13.5% growth (in yen) in 1989. In 1989 the agency established a joint venture with the largest Korean outdoor agency, now known as Iksan-Meitsu Co. Ltd. It took 49% equity. Meitsu also established an environmental design subsidiary company, Asmex, to complement new public relations and sports marketing units.

Accounts

Gained: Jindo Korean furs; Terro, NTN, DDI Corp., Meidensha, Asahi Breweries.

Officers

Yasoji Shimizu, chmn; Takuji Shimizu, pres-chmn; Yasuichi Shimizu, exec managing dir; Yoshiharu Kawate, managing dir; Kenji Mori, Katsutake Katoh, Kiyoto Nambara, John Kikuchi, Kinya Mori, Takeshi Sugawara, dirs.

Headquarters

Meitsu Inc.
1-1-3 Nishi-Shimbashi, Minato-ku,
Tokyo 105, Japan
Phone: 813-501-8460
Fax: 813-504-0504

RANK: 34

MPM Propaganda

Sao Paulo
Gross income: **$83.9** million

Income & volume ($ in millions)

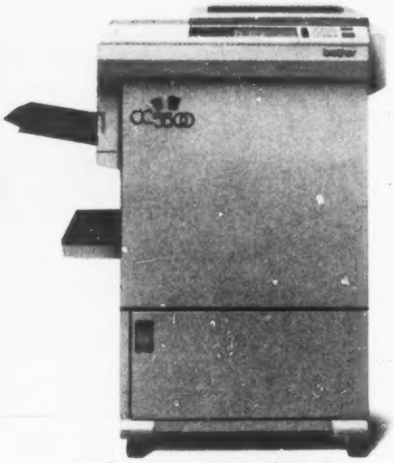
Worldwide	1989	1988	% chg
Gross income	83.9	NA	NA
Volume	220.7	NA	NA

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	900	850	5.9
Offices	13	13	0.0

Annual review

Growth in 1990 billings is expected to top 15% as the Brazilian economy grows



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stronger under new president, Fernando Collor, who took office this month. MPM's strong growth in 1989 was stimulated in part by its win of the Procter & Gamble business and the founding of an ad agency called Green. Green, which works with clients in developing their initial ad and marketing programs, had billings of $4 million. MPM has 13 offices.

Accounts

Gained: Procter & Gamble (Phebo soaps, Seiva de Alfazema perfume, Senior male cosmetics line), Kibon Sorvane (ice cream), Fertisul Serrana (agro-fertilizers).

Officers

Petronio Corea Filho, Euler Matheus, Luis Carlos Cotta, exec-vps; Raul Pinto, Waltely Longo, acct svcs dirs; Fabio Siqueira, Gilberto dos Reis, creative dirs; Vera Aldrighi, planning and rsch dir; Ivan Marques, Paulo Penteado, media dirs.

Headquarters

MPM Propaganda
Rua General Jardim 633
01223 Sao Paulo, Brazil
Phone: 55-11-255-31-11
Fax: 55-11-231-34-90

RANK: 86

Nambokusha Inc.

Tokyo
Gross income: **$20.8** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	20.8	15.2	37.2
Volume	165.2	117.2	40.9

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	195	180	8.3
Offices	4	4	0.0

Annual review

Nambokusha predicts billings will increase only about 5% in 1990 after recording a dramatic 40.9% growth in 1989 tied to substantial account wins, new assignments and the opening of a fourth office. The agency operates in Tokyo, Osaka and Nagoya. Nambokusha is 51% owned by Toyota Motor Co.

Accounts

Gained: Miwa Lock Co., Hino Motors (medium-sized trucks), Helene Curtis Japan (new shampoo & conditioner product intro).

Officers

Shoju Kawamura, president; Yoshio Kitagaki, exec managing dir; Takeyoshi Muroya, exec vp-intl.

Headquarters

Nambokusha Inc.
No. 2-25-9, Toyota Hacchoubori Bldg
Hacchoubori, Chuo-ku, Tokyo
Phone: 813-555-9231
Fax: 813-555-9220

RANK: 64

Nationwide Advertising Service

Cleveland
Gross income: **$31.0** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	31.0	27.8	11.5
Volume	206.8	185.4	11.5
U.S.			
Gross income	31.0	27.8	11.5
Volume	206.8	185.4	11.5

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	398	376	5.9
Offices	31	36	(13.9)

Annual review

A healthy 11.5% billings growth in 1989 for this recruitment agency was attributed to growth in its 31-city marketplace, enhanced service and aggressive new business efforts. The agency, which serves personnel departments of client companies, boosted its staff by 6.1%.

Officers

George Gund III, Gordon Gund, co-chmns; John W. Graham, vice chmn-ceo, treasurer; Thomas A. Richey, president-coo.

Headquarters

Nationwide Advertising Service Inc.
Halle Bldg., 1228 Euclid Avenue, 6th Fl
Cleveland, Ohio 44115
Phone: (216) 579-0300
Fax: (216) 687-6120

RANK: 87

Neville Jeffress Advertising

Sydney
Gross income: **$20.8** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	20.8	16.6	25.6
Volume	138.5	110.7	25.1

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

Annual review

Neville Jeffress Holdings is the parent of Armstrong Advertising and Neville Jeffress Advertising, the latter founded in 1949 and now the largest wholly-Australian-owned agency. The group predicts billings growth in 1990 will continue at the 15% growth clip it says it has recorded every year for the past 40 years. It has a staff of 468 in 17 offices. NJA last year entered an international equity link with Bozell Inc., opening its first U.S. office in New York called Bozell Jeffress, and plans further offices in major cities throughout the U.S. and the U.K.

Officers

Neville Jeffress, chmn-ceo; Peter Allen, managing dir; Doug Cameron, secretary-dir.

Headquarters

Neville Jeffress Holdings
7 Parraween St., Cremorne
Sydney, NSW 2090, Australia
Phone: 612-908-9011
Fax: 612-953-8244

RANK: 55

Nihon Keizai

Tokyo
Gross income: **$37.2** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	37.2	29.6	25.6
Volume	254.8	211.5	20.5

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	312	300	4.0
Offices	9	9	0.0

Annual review

Anticipating a slight Japanese business slowdown, the agency expects a 16.9% growth rate in yen this year compared to 24.3% growth in 1989. Not included in its results are returns from five subsidiaries: Nikkei Agency (recruitment), Nikkei Sangyo Kokokusha (industrial advertising), Nikkei Kokoku Seihan (film-making), Nikkei Creative Center and Business Service (consulting and management services).

Officers

Nobukazu Niwa, president; Michio Yamada, exec vp.

Headquarters

Nihon Keizai Advertising
3-6, Kanda Surugadai
Chiyoda-ku, Tokyo 101, Japan
Phone: 813-257-8111
Fax: 813-257-8126

RANK: 38

Nihon Keizaisha Advertising

Tokyo
Gross income: **$56.3** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	56.3	47.1	19.6
Volume	337.3	283.0	19.2

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	502	487	3.1
Offices	14	14	0.0

Annual review

The agency expects to build on the foundation for growth laid in 1989 that was tied to a strengthening Japanese domestic market. A 23% increase in billings is projected for 1990. The agency has 14 branch offices in Japan.

Officers

Yasuo Shimado, president; Takao Kasai, head of creative; Hiroshi Takeda, head of accts svcing.

Headquarters

Nihon Keizaisha Advertising Ltd.
13-20, Ginza 7-chome
Chuo-ku, Tokyo 104 Japan
Phone: 813-542-0411
Fax: 813-546-2707

RANK: 72

Norton Publicidade

Sao Paulo
Gross income: **$24.2** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	24.2	NA	NA
Volume	96.8	NA	NA

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

Annual review

Norton, a non-equity affiliate of Bozell Inc., continues its steady growth-largely credited to new client gains. In Brazil's high inflationary economy, the new cruzado, devalued at the beginning of 1989, has steadily dropped throughout the year, thus making prior-year comparisons meaningless. Returns include Norton's headquarters in Sao Paulo, and its Rio de Janeiro and Porto Alegre offices.

Accounts

Gained: Pan Am, VASP (local airline), Paes Mendonca supermarket, Voith (heavy equipment), Hotels Eldorado, T-Fal (cookware), Grupo Perrier, Louis Vuitton, Meridien Hotel, Sloper dept store, Multitextil.

Lost: Coppertone.

Officers

Geraldo Alonso Filho, president.

Headquarters

Norton Publicidade S.A.
Rua General Jardim 482-1
Sao Paulo, Brazil
Phone: 55-11-256-7522
Fax: 55-11-257-6045

RANK: 6

Ogilvy & Mather Worldwide

New York
Gross income: **$699.7** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	699.7	635.2	10.1
Volume	4,828.0	4,110.1	17.5
U.S.			
Gross income	305.1	281.1	8.6
Volume	2,104.4	1,874.9	12.2

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	7,725	7,671	0.7
Offices	278	275	1.1

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Ogilvy & Mather Direct, New York	305.3
Ogilvy & Mather, Atlanta	54.0
Ogilvy & Mather, Chicago	390.0
Ogilvy & Mather, Honolulu	20.0
Ogilvy & Mather, Houston	118.0
Ogilvy & Mather, Los Angeles	124.0
Ogilvy & Mather, New York	750.0

Non-U.S. offices, location	Billings
Bassat Ogilvy & Mather, Madrid(MJ)	152.3
Centrum/Ogilvy & Mather, Bogota(NE)	7.8
Corpa, Caracas(MN)	49.3
HHD Ogilvy & Mather, Brussels(MJ)	92.7
Korad Ogilvy & Mather, Seoul(MN)	118.9
Livraghi, Ogilvy & Mather, Milan(MN)	133.8
Marti, Ogilvy & Mather, Zurich(MJ)	38.1
Moran, Ogilvy & Mather, Istanbul(MN)	12.5
Northcote/Ogilvy & Mather, Santiago(MN)	11.8
Ogilvy Benson & Mather, Bombay(MN)	35.7
Ogilvy Group, London(MJ)	623.8
Ogilvy & Mather Direct Response, 37 international offices	434.1
Ogilvy & Mather 2AB, Stockholm(MJ)	17.6
Ogilvy & Mather France, Paris(MJ)	253.3
Ogilvy & Mather Germany, Frankfurt(MJ)	318.6
Ogilvy & Mather Oy, Helsinki(MJ)	17.5
Ogilvy & Mather Portugal, Lisbon(MJ)	21.2
Ogilvy & Mather Rightford, Cape Town(MN)	97.4
Ogilvy & Mather (Nederland), Amsterdam(MJ)	128.3
Ogilvy & Mather (Taiwan), Taipei(MJ)	34.5
Ogilvy & Mather, Bangkok(MJ)	38.7
Ogilvy & Mather, Budapest	0.0
Ogilvy & Mather, Copenhagen(MJ)	28.0
Ogilvy & Mather, Melbourne(MJ)	97.5
Ogilvy & Mather, Nairobi(MJ)	2.8
Ogilvy & Mather, Oslo(MJ)	31.1
Ogilvy & Mather, Petaling Jaya, Malaysia(MN)	26.5
Ogilvy & Mather, Singapore	34.9
Ogilvy & Mather, Vienna(MJ)	40.6
Ogilvy & Mather, Wellington, N.Z. (MJ)	34.3
Olbes, Ogilvy & Mather, Manila(MN)	8.6
Ortiz Scopesi (O&M), Buenos Aires	59.9
P.T. Indo Ad, Jakarta(NE)	13.2
Tiszа, Ogilvy & Mather, Moscow	0.2
Veritas/Ogilvy & Mather, Guayaquil, Ecuador(NE)	10.0
Wilson Hartnell Group, Dublin(MJ)	44.4

Annual review

WPP Group's hostile takeover of Ogilvy Group for $864 million in May generated management shakeups and client departures from subsequent account conflicts, but the agency's billings remained stable, aided by an especially strong 21.8% growth internationally. Creative Director Norman Berry resigned in June, leaving a gap not filled until Bill Hamilton joined O&M in November from the same post at Chiat/Day/Mojo, New York. In December Kenneth Roman, chairman-ceo of the Ogilvy Group, left for a position at American Express and Graham Phillips succeeded. Founder David Ogilvy added the title of WPP chairman. Earlier in the year, Peter Scarperi was named general manager of U.S. operations to aid Mr. Phillips, and Michael S. Lesser became president in New York. Foreign accounts continued to grow, markedly in the U.K. with gains of Ford Europe ($16 million), Argos Distributors ($15 million), Unilever and Lever Bros., bolstered by the February, 1990, gain of Spain's Expo '92, a $40 million account split between Madrid and London offices. Other foreign activity included adding Olivetti in Italy ($40 million), Brahma Beer in Rio ($20 million) and PTT in the Netherlands ($13 million). Losses included Lufthansa in Germany ($9 million), Polaroid pan-European ($20 million) and Shell in three countries ($20 million). Stateside, Maxwell House ($50 million) left midyear causing a 90-person layoff, but Paramount Pictures ($70 million) came aboard in February 1990. More than a $250 million gain in billings from existing clients such as American Express, Nestle and Compaq also contributed to the billings mix. In efforts to focus on the bottom line, O&M sold Euramerica, a language-translation and graphics subsidiary, and parted with Rolf Werner Rosenthal Inc., a $60 million-billing pharmaceutical agency. O&M/Zurich merged with Marti Werbeagentur for combined billings of $40 million, and an international joint media-buying agreement with Omnicom was reached forming The Media Partnership. Ogilvy & Mather Direct Response tallied a 14.2% growth in U.S. billings, or $33 million from a mix of $8.7 million in new business, $31 million in existing business and $6.7 million lost.

U.S. accounts

Gained: Houston—Remco, Electronic Data; New York—Amex Moneygram, Huggies Pull-Ups, Philip Morris Cultural Affairs, AT&T Fax; Los Angeles—Pan Pacific Hotels; Atlanta—CDC, Tru Green; Chicago—EyeMasters; Hawaii—Island of Lanai. O&M Direct: Encyclopaedia Britannica, Kinetico, Paramount Coin, Wherehouse, UA Cable, Wedge, Ford New Holland, Bulgari, Fleur de Lait.

Lost: Chicago—Brown & Williamson; Los Angeles—California Federal; Hawaii—Outrigger Hotels; New York—Best Foods, Maxwell. O&M Direct: California Federal S&L, Paramount Pictures.

International accounts

Gained: Olivetti—Milan; COI—London; Brahma Beer—Rio; Duracell—Sydney; Pepsi—Paris; Nestle—Taiwan, Malaysia, Pakistan, S. Africa, Turkey; Midas—Canada; Simplesse—Europe, based out of Germany; PTT—Netherlands; Wilkinson—UK; Radion—Portugal; Deutsche Bundes Bank—Germany. O&M Direct: Hong Kong Tourist Bureau—Hong Kong; Yamaha Europe GmbH—Germany; Compaq—Paris; American Express—Auckland.

Lost: British Gas Corporate—UK; Shell—Germany, Norway, Sweden; Gulins—Sweden; Lufthansa—Germany; Springer—Brazil.

Officers

Graham Phillips, chmn-ceo; Alexander Brody, president-ceo. O&M Direct: Jerome W. Pickholz, chmn-ceo; Stanley Winston, vice chmn-exec creative dir; Rochelle Lazarus, president-coo; Pam Reese, sr vp-genl mgr, NY; Garth Hallberg, sr vp-mgr, regional offices; Rob Smith, Targeted Communications.

Headquarters

Ogilvy & Mather Worldwide
309 W. 49th St.
New York, N.Y. 10019
Phone: (212) 237-6000
Fax: (212) 237-5515

RANK: 46

Oricom Inc.

Seoul
Gross income: **$45.1** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	45.1	32.5	38.8
Volume	173.0	137.0	26.3

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	421	350	20.3
Offices	1	1	0.0

Annual review

The agency projects growth at 15% in 1990 based on its aggressive plans to pitch new clients and strong growth anticipated for its sales promotion department. Totals include Oricom's 51% ownership in HDM Korea Inc., Seoul. Oricom is owned by the Doosan Group in Korea.

Accounts

Gained: SunKyung Magnetic (audio tape), Data Communications Corp. of Korea (computer communication service), Dongwon Industries Co. (frozen foods and seafood), Shinwoo Co. (leather goods), Kiwi Korea (shoe polish, cleaner).

Lost: Daewoo Motor Co. (autos), Kolon International (formal suit and sports wear), Peeres Cosmetics.

Officers

Jungsuk Yang, president; Taeyong Rhee, Jonghee Han, exec managing dirs; Pyungsoo Min, Hayong Uom, Kenkoo Kan, exec dirs.

Headquarters

Oricom Inc.
105-7, Nonhyun-dong, Kangnam-ku
Seoul, Korea
Phone: 822-510-3114
Fax: 822-542-3966

RANK: 45

Orikomi Advertising

Tokyo
Gross income: **$47.5** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	47.5	40.8	16.3
Volume	435.8	419.9	3.8

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	364	358	1.7
Offices	5	5	0.0

Annual review

Orikomi, whose billings rose only 3.8% in 1989, expects a growth rate of 15% in billings in 1990, reflecting a GNP growth of 4-5% for the year in Japan. Part of the agency increase is based on new account acquisitions, including special events (golf, concerts among them). Orikomi consolidated figures also include its 60% ownership in Backer Spielvogel Bates/Japan, part of the BSBW network within Saatchi & Saatchi PLC.

Accounts

Gained: Suntory, Fujitsu, Sony, Casio, Tohkai, Olympus, Pioneer.

Lost: Kirin-beer, Kadokawa, Daiichi-Seimei, Nihon-Seimei.

Officers

Fusajiro Saito, chmn; Kazuo Watanabe, president; Kazuo Negishi, Shoji Hosoya, Sohichi Kikuchi, exec managing dirs; Tetsuya Kajitani, Akira Sagawa, managing dirs; Isao Yamada, Hideo Yagihara, Jyosuke Kuroda, Ben Katayama, dirs.

Headquarters

Orikomi Advertising
Ozu Bldg. 2-6-3 Nihonbashi-Honcho
Chuo-ku, Tokyo, 103, Japan
Phone: 813-665-4704
Fax: 813-661-7689

RANK: 97

Osaka Yomiuri Advertising

Osaka, Japan
Gross income: **$18.5** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	18.5	16.2	14.0
Volume	142.1	124.6	14.0

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	290	290	0.0
Offices	3	2	50.0

Annual review

Billings improved 17.7% in yen for the Osaka-based agency, which added an office in 1989. The agency predicts billings will advance more than 12% in 1990 over the prior year because of increased spending from existing clients.

Officers

Yasumitsu Kuwana, chmn; Kenji Akao, president; Seiichi Itakawa, sr managing dir; Susumu Hatanaka, Shin Naruse, Isao Hamasaki, managing dirs; Toshio Ishizaki, Yasuji Inoue, dirs.

BJK&E shortens to Bozell

Bozell Inc. emerged in 1989 as the renamed agency within Bozell, Jacobs, Kenyon & Eckhardt Inc., which had evolved into a holding company also to includagency, Poppe Tyson. An LBO freed the agency from Lorimar Corp. in 1988. Bozell, Jacobs, Kenyon & Eckhardt remains the name of the holding company. ☐

■ Headquarters

Osaka Yomiuri Advertising
Higash-Hankyu Bldg.
1-1Kakuda-cho, Kitaku
Osaka, Japan
Phone: 816-313-1321
Fax: 816-315-1971

RANK: 17

Publicis-FCB Communications B.V.

Paris
Gross income: **$358.8** million

■ Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	358 8	337 0	6 5
Volume	2 405 4	2 278 6	5 6

■ Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

■ Office billings in 1989 ($ in millions)

U.S. offices, location	**Billings**
Publicis, New York	31 7

Non-U.S. offices, location	**Billings**
Arge, Madrid(MJ)	57 6
Art & Copy.FCB Group, Oslo(MJ)	33 3
Baums, Mang & Zimmerman, Duesseldorf(MN)	89 9
Ciesa NCK, Lisbon(MJ)	22 1
Comunicar, Lisbon(MJ)	4 6
Farner Publicis.FCB, Zurich(MJ)	59 0
FCB Advertising, London(MJ)	130 6
FCB Direct Marketing, Hamburg(MJ)	5 4
FCB Frankfurt, Frankfurt(MJ)	23 0
FCB Publicidade, Lisbon(MJ)	27 3
FCB/Hiort, Steenies & Walter, Copenhagen(MJ)	9 3
Foote, Cone & Belding, Neuilly, France(MJ)	128 2
Gnomi/FCB, Athens(MN)	12 4
Intermarco/FCB, Stockholm(MJ)	56 4
Molino & Publicis, Barcelona(MJ)	9 3
Mundo Direct, Brussels(MJ)	3 4
MWI Markenwerbung, Hamburg(MJ)	52 8
Park Publicidade, Lisbon(MJ)	6 5
Publicis Conseil, Paris(MJ)	874 8
Publicis FCB Direkt, Frankfurt(MJ)	2 6
Publicis FCB Holland, Amsterdam(MJ)	70 8
Publicis Germany, Duesseldorf(MJ)	76 3
Publicis Wien, Vienna(MJ)	18 0
Publicis, Lisbon(MJ)	20 9
Publicis, London(MJ)	196 7
Publicis-FCB, Brussels(MJ)	45 1
Publicis-FCB, Madrid(MJ)	30 3
Publicis-FCB/MAC, Milan(MJ)	363 9

■ Annual review

Publicis-FCB B.V., a manifestation of the alliance struck between Foote, Cone & Belding Communications and Publicis Communications, the advertising side of the French holding company, Publicis S.A., is a combination of the mutual European holdings of the two companies into a single jointly-owned network. Most offices in the various countries have been merged, although some remain separate "to provide distinction and to avoid client conflicts," notes the network. There is a single chairman per country whose responsibilities cover all offices in that country. In 1989, the alliance acquired Italian agency MAC and merged it with Publicis, FCB, Park and Concept operations in that country, bought the Spanish agency Arge and 35% of French media-buyer, Interplan-Idemedia. B.V. also merged FCB Advertising and Mallet McCormick in the U.K., Publicis and FCB in Netherlands and Spain; Publicis, Impact/FCB and Park in Belgium, Publicis and Ciesa/NCK in Portugal, and Publicis and FCB Goteborg in Sweden. B.V.'s executive committee got new leadership when Maurice Levy, chairman of the Paris agency, Publicis Conseil, added to his title the chairmanship of Publicis-FCB, replacing Craig Wiggins who became chairman, FCB International in New York. B.V. was separated from FCB's non-Europe holdings because the two are structurally linked only through minority investments Publicis and FCB hold in each other.

■ Network accounts

Gained: Philips-Whirlpool (Europewide)—UK, S.C. Johnson & Son (personal care)—Europewide; Casino supermarket chain—France; ASDA—UK; Air France—Austria; Cadbury Schweppes—Belgium, Holland; Zenith—Belgium; Diner's Club—France; Renault—Italy (cars); Nabisco—Italy; Cadbury Schweppes—Switzerland; Kimberly-Clark—Switzerland (Kleenex); Shulton men's products—UK (Europewide campaign).

■ Officers

Executive committee—Maurice Levy, chmn-ceo; Gerard Pedraglio, exec vp; Jean-Paul Morin, sr vp. European Management Board—Messers Levy, Pedraglio and Morin, Antonio Beja, Claude Marcus; Stephane Pincas, Claude Pradere, Salomon Salto, vps-intl client svcs; Ned Wiley, vp-new business devel, direct mktg; Simon Lloyd, vp-media; VPs, country mgrs—Paulo de Abreu (Portugal), Georg Baums (Germany), Michael Conroy (UK), Claudio Masi (Italy).

■ Headquarters

Publicis-FCB Communications B.V.
133 Champs Elysees
75008 Paris, France
Phone: 331 47 20 78 00
Fax: 331 47 20 29 60

RANK: 96

Richards Group

Dallas
Gross income: **$18.7** million

■ Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	18 7	15 1	24 3
Volume	125 1	101 4	23 4
U.S.			
Gross income	18 7	15 1	24 3
Volume	125 1	101 4	23 4

■ Workforce & facilities

Worldwide	1989	1988	% chg
Employees	194	166	16 9
Offices	1	1	0 0

■ Annual review

A strong list of new clients including Ponderosa ($17 million), Pizza Inn ($20 million), First Gibraltar and Tony Lama Co. easily cushioned the Long John Silver's loss as billings increased 23.4% in 1989. LJS stayed with the agency only a year. Of the lost accounts, half were resigned. Larry Spiegel came on as the sixth principal of the 13-year-old Dallas shop, which tries to avoid executive layers.

■ U.S. accounts

Gained: Ponderosa, Pizza Inn, First Gibraltar, Pilgrims Pride, Tony Lama, M/A/R/C, The Container Store, Pardee Construction Co., YYVX Telecommunications.

Lost: Long John Silver's, Hibernia National Bank, *Dallas Times Herald*, Sun Industries, Granada.

■ Officers

Principals—Stan Richards, Brad Todd, Jim McGhee, Rod Underhill, Scott Crockett, Larry Spiegel.

■ Headquarters

The Richards Group
10,000 N. Central, Ste. 1200
Dallas, Texas 75231
Phone: (214) 891-5700
Fax: (214) 891-5844

RANK 62

Hal Riney & Partners

San Francisco
Gross income: **$33.8** million

■ Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	33.8	23.0	46.7
Volume	225.0	200.0	12.5
U.S.			
Gross income	33.8	23.0	46.7
Volume	225.0	200.0	12.5

■ Workforce & facilities

Worldwide	1989	1988	% chg
Employees	238	183	30.1
Offices	3	3	0.0

■ Annual review

Riney spent much of the year denying rumors that it was for sale. After its big win of Saturn Corp. ($80-$100 million) in 1988, the agency was expected to get $40-$50 million additional business from Saturn dealer groups. New accounts gained included $10 million Deere & Co., $10 million Informix Software, $7 million John Nuveen & Co. and $5 million Pharmavite vitamins which easily countered losses including $3 million Shaklee Corp. Best Water Purification System, and the $7 million Dreyer's Grand Ice Cream. Since August, 1989, ten executives have left including four who formed Atlas Citron Haligman & Bedecarre, San Francisco. This month Hal Riney, fielding the weekly "for sale" question, proffered a new headline: "For sale, no; merger, maybe . . . but with the right partner."

■ U.S. accounts

Gained: Deere & Co. consumer lawn and garden equipment, Golden Nugget, IBM-Rolm, KRON-TV, MONY Financial Services, John Nuveen & Co., Informix Software Inc., Pharmavite Corp. Nature Made vitamins.

Lost: Dreyer's Grand Ice Cream, Blue Cross and Blue Shield Federal Employee Program.

■ Officers

Hal Riney, chmn-ceo; James D. Travis, president, coo; John Yost, sr vp-genl mgr; Lyn Muegge, sr vp-cfo; Gerald Andelin, Bruce Campbell, sr vps-creative dirs;

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Advertiser Syndicated Television Association, 1756 Broadway, New York, N.Y. 10019
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Thomas O. Tieche, sr vp-assoc creative dir. Chicago: Lisa Fortini-Campbell, sr vp-genl mgr; New York: Jim Travis, president-coo; Helayne Spivak, sr vp-exec creative dir; Tully Plesser, sr vp-market planning and rsch.

Headquarters

Hal Riney & Partners Inc
735 Battery St.
San Francisco, Calif. 94111
Phone: (415) 981-0950
Fax: (415) 955-4392

RANK: 94

Rosenfeld, Sirowitz, Humphrey & Strauss

New York
Gross income: **$19.1** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	19.1	17.4	9.5
Volume	127.0	116.0	9.5
U.S.			
Gross income	19.1	17.4	9.5
Volume	127.0	116.0	9.5

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	176	124	41.9
Offices	2	2	0.0

Annual review

Increases in client budget will continue to pace the agency's growth in 1990, albeit at an anticipated 20% increase compared to the 9.5% in 1989. Existing clients boosted their budgets by $12.8 million in billings 1989, which, added to $7.5 million in new billings gains, more than offset $9.3 million in billings tied to departing clients.

U.S. accounts

Gained: Rax Restaurants, F. Wildman & Sons (Folinari), Fur Vault, Chase Manhattan Bank, Smith Corona-Canada.

Lost: Playtex Family Products (Jhirmack), Block Drug Co. (X14).

Officers

Ronald Rosenfeld, Leonard Sirowitz, Harold Strauss, co-chmn; Linda Srere, exec vp.

Headquarters

Rosenfeld, Sirowitz, Humphrey & Strauss Inc.
111 Fifth Ave.
New York, N.Y. 10003
Phone: (212) 505-0200
Fax: (212) 979-6120

RANK: 32

Ross Roy Group

Bloomfield Hills, Mich.
Gross income: **$97.7** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	97.7	85.2	14.6
Volume	651.1	568.1	14.6
U.S.			
Gross income	97.7	85.2	14.6
Volume	651.1	568.1	14.6

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	1,046	955	9.5
Offices	16	11	45.5

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Calet, Hirsch & Specter, New York	94.6
Gray & Kilgore, Troy, Mich.	8.0
Griswold Inc., Cleveland	47.5
Group 243, Ann Arbor	65.0
Ross Roy Inc., Detroit	418.8
Wergeles & Drazen, New York	17.2

Annual review

Ross Roy forecasts 8% growth in 1990 from existing and new business. During 1989 when billings grew 14.6%, there was no major change in spending from existing clients, but the agency expanded through acquisition. It bought Group 243 in Ann Arbor and Nathan Fraser Agency in Toronto. Expansion through acquisition continued in early 1990 with the purchase of Anthony M. Franco Inc., Detroit's largest pr company. It will operate as an independent subsidiary. With offices in New York and Cleveland, Franco's 1989 fee income was $4.85 million. Ross Roy Retail also debuted in early 1990, as an outgrowth of last fall's K mart/CBS sweepstakes, to develop joint retailer/vendor promos and advertising for new and existing retail clients. Peter Vetowich, exec vp-director of retail operations, added the title of manager of Ross Roy Retail.

U.S. accounts

Gained: K mart's Builders Square, Chrysler Service, Traverse Bay Fruit Co. (Michigan dried cherries), Citicorp N.A., B.F. Goodrich De-Icing Systems, Royal Appliance Mfg. Co., Duskin Co. Ltd.

Lost: Stroh Foods, Getty Petroleum Corp., Westpoint Pepperell, Hoover.

Officers

Glen W. Fortinberry, ceo-chmn; Chris A. Lawson, exec vp-cfo; Patrick J. Morin, president, Griswold Inc.; Bruce Wagner, exec vp-dir client svcs; Richard C. Ward, exec vp-dir, Ross Roy Communications; Janet Muhleman, president, Group 243; Ricardo Cavillo, president, Calet, Hirsch & Spector; Calvin Parent, president, Commercial Associates.

Headquarters

Ross Roy Group
100 Bloomfield Hills Parkway
Bloomfield Hills, Mich. 48013
Phone: (313) 433-6000
Fax: (313) 433-6135

RANK: 20

RSCG

Paris
Gross income: **$175.3** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	175.3	151.6	15.7
Volume	1,234.3	1,128.2	9.4
U.S.			
Gross income	27.3	18.2	49.6
Volume	216.8	151.9	42.7

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Tatham-Laird & Kudner, Chicago	220.8
Lally McFarland Pantello, New York	58.0
Messner Vetere BCS/RSCG, New York	64.0
Non-U.S. offices, location	**Billings**
Ateliers ABC, Paris(MJ)	16.8
Cash RSCG, Zurich(MJ)	11.8
Collette, Paris(MJ)	15.7
Colman RSCG, London(MJ)	107.3
CPV, Paris(MJ)	13.1
Creative Business, Issy-les-Moulineaux, Fr. (MJ)	62.7
Edifrance, Paris(MJ)	8.8
Faure Vadon Forest Bridoux, Paris(MJ)	31.1
Geudeker Oerlemans RSCG, Amstelveen, Neth. (MJ)	24.3
Landrin et Associes, Paris(MJ)	2.1
Leitmotiv RSCG, Madrid(MJ)	46.3
Meunie Granier Deterre, Paris(MJ)	11.8
Monhard Flimen, Paris(MJ)	3.1
Promo 2000, Paris(MJ)	10.4
RSCG Butter Rang, Duesseldorf(MJ)	71.4
RSCG Export, Issy-les-Moulineaux, France(MJ)	22.1
RSCG France, Issy-les-Moulineaux, France(MJ)	705.4
RSCG Hawi, Stockholm(MJ)	11.4
RSCG Jasch & Schramm, Vienna(MJ)	14.0
RSCG Mezzano Costantini Mignani, Milan(MJ)	96.9
RSCG Palavidis, Athens(MJ)	3.3
RSCG Portugal, Lisbon(MJ)	4.2

Annual review

Growth by acquisition characterized RSCG as it opened 1989 with the buyout of KLEM, Casablanca, Morocco's second-largest agency, and launched 1990 by taking over KLP Group, London, and firing its managing director, Gerry Postlethwaite. In between, RSCG gained a stronger U.S. foothold by buying 51% of Messner Vetere Berger Carey Schmetterer, New York, in March and Lally McFarland Pantello, New York, in September, prior to purchasing Chapman/-Palavidis in Athens in October and the creation of RSCG Portugal, Lisbon, in December. RSCG typically takes 51% equity in an agency, leaving the remainder in local hands, but expands its ownership incrementally—a process that includes exchanging shares of RSCG with owners of the local agency. RSCG is buying a majority interest in Madell Wilmot Pringle & Partners, London, to handle the Citroen account in the U.K., thereby terminating RSCG's link with Woollams Moira Gaskin O'Malley there, in which it held 26% equity. RSCG's biggest agency outside Europe is Chicago's Tatham-Laird & Kudner, owned 70% by RSCG.

U.S. accounts

Gained: Richardson-Vicks (Vicks Throat Drops, Chloraseptic), Stouffer Foods (Lean Cuisine, Right Course Entrees), Grace Cocoa (Mrs. Fields Chocolate Chips) Ralston Purina (Double Chex Brand Cereal, Beggin' Strips, new prods,) Sunbeam Appliance Co., Illinois Bell, First Chicago Corp. (retail & commercial).

Lost: Kayser-Roth Hosiery, Household Bank, Ralston Purina (Wonder Bread).

Other network accounts

Gained: Office du Tourisme Tunisien, Le Printemps dept store, Moulinex, Tambrands, Piaget, Bel/Vache Qui Rit, 1992 Winter Olympic Games, Celio men's wear, Clayeux baby's wear, Atari, Guerlain's Samsara perfume, Sandoz medicines.

Lost: La Redoute (mail order), Gymnase Club, Fisher Price, Tensia/Carolin cleaning prods, Au Bon Marche dept store, Mariner men's wear, Paris Mutuel Urbain, Alain Afflelou glasses.

Officers

Bernard Roux, chmn; Jacques Seguela, Charlotte Beers, vice-chmn; Alain Cayzac, president RSCG France; Jean-Michel Goudard, president RSCG Intl.

Headquarters

Roux Seguela Cayzac & Goudard
99-115 Quai du President Roosevelt
92136 Issy-les-Moulineaux, France
Phone: 331 40 93 92 93
Fax: 331 40 93 00 01

RANK: 100

Rubin Postaer & Associates

Los Angeles
Gross income: **$17.4** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	17.4	17.5	(0.6)
Volume	143.1	128.7	11.2
U.S.			
Gross income	17.4	17.5	(0.6)
Volume	143.1	128.7	11.2

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	157	148	6.1
Offices	2	2	0.0

Annual Review

An $11.2 million increase in billings from existing accounts dominated the billings mix that also drew $3.2 million in new business gains. No clients departed the agency. Existing clients particularly stimulating growth were Home Federal Bank, Yokohama Tire and American Honda Corp. Early in the year, the agency drew praise for its work for American Honda that featured a mock-up of the Stealth bomber to introduce the Honda CRX Si. Growth of 10%-12% is predicted for 1990 from new and existing business.

U.S. accounts

Gained: Fred Hayman Beverly Hills, Seiko Instruments USA.

Officers

Gerrold R. Rubin, president; Larry Postaer, exec vp-dir creative svcs. Sr vps—Gary Wenzel, dir acct planning; Pam Warren, dir media resources; Chuck Valentine, Tom Kirk, group acct dirs; Vincent Mancuso, vp-dir finance & admin; Bill Cummins, vp-dir of rsch.

Headquarters

Rubin Postaer & Associates
11601 Wilshire Blvd.
Los Angeles, Calif. 90025
Phone: (213) 208-5000
Fax: (213) 478-3103

RANK: 2

Saatchi & Saatchi Advertising Worldwide

New York
Gross income: **$890.0** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	890.0	740.5	20.2
Volume	6,049.9	5,053.9	19.7
U.S.			
Gross income	395.2	326.3	21.1
Volume	2,778.9	2,209.6	25.8

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	7,267	7,750	(6.2)
Offices	NA	NA	NA

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
AC&R Advertising, Ft. Lauderdale	0.4
AC&R Advertising, Los Angeles	78.5
AC&R Advertising, Miami	NA
AC&R Advertising, New York	284.6
AC&R Advertising, San Diego	5.7
AC&R Advertising, San Francisco	NA
Conill Advertising, Los Angeles	4.2
Conill Advertising, New York	32.3
Hoffman York & Compton, Chicago	0.2
Hoffman York & Compton, Milwaukee	37.7
HoffmanYork & Compton, Minneapolis	2.3
Kleminer Advertising, New York	121.1
McCaffrey & McCall, Atlanta	3.0
McCaffrey & McCall, Irvine, Calif.	13.0
McCaffrey & McCall, New York	228.0
McCaffrey & McCall, Zionsville, Ind.	10.0
Rumrill-Hoyt, Rochester, N.Y.	86.6
Saatchi & Saatchi Advertising, New York	1,527.1
Saatchi & Saatchi/DFS, San Francisco	58.0
Saatchi & Saatchi/DFS, Torrance, Calif.	267.0
Team One, El Segundo, Calif.	110.0
Saatchi & Saatchi Direct, Atlanta	NA
Saatchi & Saatchi Direct, New York	25.9
Saatchi & Saatchi Direct, Rochester, N.Y.	25.3
Saatchi & Saatchi Direct, San Francisco	2.7
Non-U.S. offices, location	**Billings**
Ace/Saatchi & Saatchi, Manila(MJ)	17.9
Adel/Saatchi & Saatchi, Athens(JV)	26.6
Adv. Assoc. Compton, Hamilton, Bermuda(NE)	13.1
AW/Saatchi & Saatchi, Caracas(MN)	12.0
Badillo/Saatchi & Saatchi, San Juan(MJ)	86.2
Barker, McCormac Group, Harare, Zimbabwe(NE)	9.9
Belier Comunicacao, Sao Paulo(NE)	35.1
CGR Communications, Kingston, Jamaica(NE)	6.5
Cipta, Jakarta(NE)	11.9
Cumbre/Saatchi & Saatchi, Santo Domingo(NE)	1.8
Everest Advertising, Bombay(NE)	22.0
Guzel Sanatlar, Istanbul(NE)	23.0
Horizon Advertising, Gaborone, Botswana(NE)	1.1
Impuls, Zurich(NE)	35.0
Intermarkets, Beirut(NE)	NA
Israel & De Bianchi, Santiago(NE)	7.8
KHBB, London(MJ)	185.3
Klerck & McCormac, Johannesburg(NE)	46.6
Lautrec/Saatchi & Saatchi, Buenos Aires(NE)	51.4
Lonsdale/S&S, Port of Spain, Trinidad(MN)	6.3
Lonsdale/S&S, St. Michaels, Barbados(MN)	3.2
Magnet Advertising, Athens(NE)	4.0
Marketing Communications, Nairobi(NE)	1.6
MIG Publicidad, Lima(NE)	12.6
Montenegro-Saatchi & Saatchi, Mexico City(NE)	8.8
Oy Interplan, Helsinki(NE)	20.2
Peter Gilbert Advertising, Lusaka, Zambia(NE)	0.2
Propaganda Sancho, Bogota(NE)	18.0
Publicitas, Guayaquil, Ecuador(NE)	3.1
RCP-Saatchi & Saatchi, Barcelona(MJ)	120.7
Saatchi & Saatchi Advertising, Amsterdam(MJ)	83.5
Saatchi & Saatchi Advertising, Bangkok(MJ)	20.1
Saatchi & Saatchi Advertising, Copenhagen(MJ)	8.6
Saatchi & Saatchi Advertising, Dublin(MJ)	27.0
Saatchi & Saatchi Advertising, Frankfurt(MJ)	207.3
Saatchi & Saatchi Advertising, Hong Kong(MJ)	19.5
S&S Advertising, Jeddah, Saudi Arabia	14.0
Saatchi & Saatchi Advertising, London(MJ)	1,042.3
Saatchi & Saatchi Advertising, Oslo(MJ)	8.3
Saatchi & Saatchi Advertising, Paris(MJ)	224.5
Saatchi & Saatchi Advertising, Rome(MJ)	221.3
Saatchi & Saatchi Advertising, Singapore(MJ)	20.5
Saatchi & Saatchi Advertising, Stockholm	19.8
Saatchi & Saatchi Advertising, Sydney(MJ)	106.1
Saatchi & Saatchi Advertising, Tokyo(MJ)	48.3
Saatchi & Saatchi Advertising, Vienna(NE)	34.9
S&S Advertising, Wellington, N.Z. (MJ)	75.5
Saatchi & Saatchi BC, Geneva(MJ)	21.6
S&S Compton Hayhurst, Toronto(MJ)	107.4
Saatchi & Saatchi Gaynor, Taipei(MJ)	20.0
Saatchi & Saatchi/FDBP, Brussels(MJ)	15.3
Saatchi & Saatchi/Laurent, Stockholm(MJ)	21.7
Sistema, Lisbon(MN)	36.2
S&SA, Kuala Lumpur, Malaysia(MN)	1.0

Annual review

As parent Saatchi & Saatchi PLC suffered an earnings decline and looked at putting on the block much of its consulting companies, it made an avowed commitment to refocus on advertising. Winning the retail half of the $215 million Burger King account midyear became the largest parcel of new business that Saatchi & Saatchi Advertising has won since 1987. For the whole year, the agency gained $198 million worldwide from new accounts gained, including $20-$25 million Thompson Medical's Dexatrim (plus Cafferdrine, Cortizone 5 and Encare). The biggest chunks of the $49 million in billings that left with departing clients were $10 million each for CPC International Best Food's Skippy peanut butter and Pioneer Electronics. Overseas account gains included $60 million Johnson & Johnson pan-European TV and print sanitary products campaign, and $30 million Unicliffe's Plax dental rinse launch in Europe, Africa, the Middle East and India. Losses included $40 million worth of TV buying in the U.K. for H.J. Heinz (to comply with Mars client-conflict policy) and $35 million Toyota Australia although it kept part of the business. Gary Susnjara resigned as president-coo of Saatchi & Saatchi DFS in May to pursue independent consulting after 22 years at the agency. Michael Keeshan was promoted to president-coo of the New York office and Edward Wax became president-ceo of Saatchi & Saatchi Advertising, the North American unit of Saatchi & Saatchi Advertising Worldwide, assuming the responsibilities previously held by O. Milton Gossett and Stuart Upson, who continue as co-chairmen-ceos. The Torrance, Calif., and San Francisco offices were merged into a new group, Saatchi & Saatchi DFS/Pacific. John Hirschboeck succeeded David Wager who resigned as president of Saatchi & Saatchi Team One, formed mainly to handle the estimated $60 million Lexus account. In December Gary Landis was moved to vice chairman, a new post at Saatchi & Saatchi Affiliate Group, from president-coo of McCaffrey & McCall which is buying itself back from Saatchi. He was succeeded by William Vieser, formerly vice-chairman, director of client services. Midyear Werner Goerke, chmn-ceo of Saatchi & Saatchi Advertising, Frankfurt, was named the company's first European director for international client services to oversee work for marketers taking a pan-European approach—starting with Procter & Gamble. Saatchi & Saatchi Direct Worldwide, Paris, merged with Cezame Conseil to create Cezame/Saatchi & Saatchi Direct. Saatchi & Saatchi Advertising Worldwide, London, bought a majority share in Jahnsson & Sjogren, Stockholm, and ended its affiliation with Blanking, Malmo. Saatchi & Saatchi Advertising Japan was formed by the merger of Saatchi & Saatchi Advertising K.K. and Yomiko DFS, both located in Tokyo. At yearend, the Saatchi brothers, Maurice and Charles, turned over the reins of the holding company to its first outsider, Robert Louis-Dreyfus, who was the former IMS International Research chief.

U.S. accounts

Gained: Saatchi & Saatchi Advertising Worldwide: Burger King (national retail and new prods), L.A. Gear (intl ads), Salomon (ski equipment), Thompson Medical (Dexatrim, Caffedrine, Cortizone 5 and Encare), Conroy's, Apollo Computers, Cancun Resorts, Cozumel Resorts, Ixtapa Resorts, Sterling Optical, San Miguel USA (beer), Datability.

Lost: CPC International Best Foods (Skippy peanut butter and Hellmann's), Mexican Tourism, Krystal restaurants, Donnelley (One Book), Pioneer Electronics, Northrup King (seeds). Saatchi & Saatchi Advertising/New York: Burger King (national retail and new prods), Cancun Trust, Cozumel Trust (resort devels), Sterling Optical, Thompson Medical. Saatchi & Saatchi DFS/Pacific, Southern California: Conroy's Flowers. Saatchi & Saatchi DFS/Pacific, San Francisco: San Miguel International USA (beer and grocery prods). Saatchi & Saatchi Team One: Lexus Dealer Assns, Sapporo USA (imported beer prods).

International accounts

Gained: Gillette, Hewlett-Packard, Johnson & Johnson, Matsushita, Pirelli—pan-Europe; Allied Lyons—Belgium, Hong Kong, Malaysia, Singapore, Taiwan; BSN—Australia, Belgium, Holland; DHL—Jamaica, Taiwan, Middle East; Du Pont—France, Germany, UK; Gillette—Portugal; Hewlett-Packard—Belgium, Denmark, Germany, Greece, Holland, Italy, Norway, Sweden, Switzerland, UK, Turkey, Johnson & Johnson—Austria, Belgium, Holland, Italy, Peru, Puerto Rico, Jamaica, Trinidad, Australia, India; Matsushita—Singapore; Pirelli—Belgium, France, Italy, Southeast Asia, Taiwan, Korea; Pfizer—Austria, Belgium, Denmark, France, Germany, Holland, Portugal, Spain, Sweden, Switzerland, Middle East; P&G—Denmark, Norway, Venezuela, Dominican Republic, Japan, Malaysia, Korea; Reckitt & Colman—Belgium, France, Germany, Italy, Spain; Sara Lee—Belgium, France, Holland, Portugal, Hong Kong; Toyota—Australia, Hong Kong.

Losses: Beecham—France; Honda—Holland; BAT—Hong Kong.

Officers

Saatchi & Saatchi Advertising Worldwide: Stuart Upson, O. Milton Gossett, co-chmns, ceos; Saatchi & Saatchi Advertising North America: Edward L. Wax, ceo; Robert Kennedy, coo, Richard P. O'Brien, vice chmn. Saatchi & Saatchi Advertising International: R. Humphreys. Saatchi & Saatchi Advertising/New York: Joseph P. Mack, chmn; Michael Keeshan, president. Saatchi & Saatchi DFS Pacific: Joe Cronin, president-ceo (Torrance), Ronald Colnett, chmn (San Francisco).

Headquarters

Saatchi & Saatchi Advertising Worldwide
375 Hudson St.
New York, N.Y. 10014
Phone: (212) 463-2000
Fax: (212) 463-9855

RANK: 80

Salles/-Inter-Americana

Sao Paulo
Gross income: **$22.0** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	22.0	NA	NA
Volume	109.9	NA	NA

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

Annual review

Limited dollar growth in billings is predicted this year by Salles Inter-Americana because of strong economic measures likely to be imposed by the new government to bring Brazil's rampant inflation under control. During 1989, Salles increased its equity in GTM&C, Sao Paulo, from 49% to 60%. It included 49% of GTM&C's results in its results in 1989 and 35% of another agency, ASA-Criacao de Publicidade, Belo Horizonte. Salles boosted its creative department by hiring Neil Ferreira, a well-known creative in Brazil. Agency president, Luiz Salles, was kidnapped by extortionists in July and held captive for 67 days. He was released unharmed.

Accounts

Gained: Rio de Janeiro Metro, NHT Hotels, Nova Odessa textile fabrics, Editora Azul publishing.

Lost: Brahma Beer.

Officers

Luiz Salles, president; Paulo Salles, vp; Mauro Salles, counsel; Apolonio Salles Filho, vp-Brasilia; Edeson Coelho, vp-Rio de Janeiro.

Headquarters

Salles/Inter-Americana
R. Borges Lagoa, 1328
04038 Sao Paulo, Brazil
Phone: 11-55-571-1940
Fax: 11-55-575-4041

RANK: 65

Sanko-Sha

Tokyo
Gross income: **$28.9** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	28.9	26.4	9.5
Volume	190.6	174.1	9.5

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

Annual review

Growth from existing accounts and new client gains pushed Sanko-Sha billings up an estimated 9.5% in dollars, despite the loss of five clients in the media industry. The agency reports for six offices throughout Japan.

Accounts

Gained: Olympic (sports retailer), UNY, Maruei dept store, Meitec, Meiraku (milk).

Lost: *Chunichi Shinbun* and *Sahi Shinbun* (both newspapers), Nagoya TV and Tokai TV (both broadcasting), CBS Radio.

Officers

Teiji Kawamura, exec dir.

Headquarters

Sanko-Sha Advertising
20-9 3-Chome Marunouchi
Naka-Ku Nagoya, Japan
Fax: 8152-962-0680

RANK: 27

Scali, McCabe, Sloves

New York
Gross income: **$127.0** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	127.0	107.0	18.7
Volume	870.1	770.6	12.9
U.S.			
Gross income	79.0	71.8	9.9
Volume	590.3	559.7	5.5

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	1,468	1,438	2.1
Offices	16	16	0.0

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Fallon McElligott, Minneapolis	131.3
Martin Agency, Richmond, Va	140.5
Scali, McCabe, Sloves, New York	318.5
Non-U.S. offices, location	**Billings**
Abbott Mead Vickers SMS, London(NE)	194.4
Audour, Soum, Larue/SMS, Paris(MJ)	32.1
Futura/Scali, McCabe, Sloves, Sao Paulo(MJ)	15.3
Hildmann Simon Rempen Schmitz SMS, Duesseldorf(MJ)	79.9
Rileva, Zamorano, Rodriguez, Madrid(MJ)	22.5
Scali McCabe Sloves de Mexico, Mexico City(MJ)	23.1
Scali, McCabe, Sloves-Canada, Toronto(MJ)	49.8
Scali, McCabe, Sloves, Melbourne(MJ)	7.3

Annual review

The sluggish U.K. stock market was blamed for the failed attempt by Scali to buy back majority control from WPP Group in early 1990. Scali managers currently own 20% of the shop as part of a previous minority buyback from Ogilvy Group, itself acquired in 1989 by WPP. Scali consists of a single flagship office and a loose "confederation" of overseas partners in which it typically owns a majority. Scali owns 80% of both Fallon McElligott, Minneapolis, and the Martin Agency, Richmond, Va., which have witnessed defections of founding partners since the acquisition of majority interest. The Scali billings mix in 1989 included gains of $20 million from new accounts and $11.3 million from existing clients that offset $17.7 million in lost billings. The most notable loss was the October departure of Hertz ($22 million) which had been put up for review. Wins included Pella ($9 million) and Lotus software ($5-$7 million).

U.S. accounts

Gained: Lotus, Trump Shuttle, Renaissance, Pella, Ault Dairy, Amoco motor oil, Jim Beam, Banc One, Bassett-Walker, FMC Corp., Avon, Corona, Dep, Showtime, HMH Communications, Thom McAnn, Corona Clipper.

Lost: Hertz, Time Life Books, Knox Lumber, Foltene hair products, Mash's, Henry Ford Museum, Maserati, TeleUSA.

International accounts

Gained: Kimberly-Clark, Borden Cica, Nutrasweet, Philip Morris.

Lost: Grupo, Champion, Hertz International, Beecham, FNAC, Agfa.

Officers

Martin Sloves, chmn-ceo; Sam Scali, president-worldwide creative dir; Robert Levenson, vice chmn-creative dir; Keith Green, exec vp-dir mktg and client svcs; Lee Graham, president-SMS Direct; Jerry Sherman, president-sales promo; Gail Lieberman, exec vp-cfo; Judy Pines, exec vp-genl mgr; Stuart Epstein, John Slaven, exec vps-group mgmt reps; Barbara Titus, exec vp-rsch; Alan Jurmain, exec vp-media.

Headquarters

Scali, McCabe, Sloves
800 Third Ave
New York
N.Y. 10022
Phone: (212) 735-8000
Fax: (212) 735-8418

RANK: 44

Sogei Co.

Tokyo
Gross income: **$49.2** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	49.2	39.2	25.7
Volume	300.2	263.0	14.2

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	437	420	4.0
Offices	7	7	0.0

Annual review

In keeping with annual billings increases in the latter 1980s, Sogei Co. anticipates growth of 20% in 1990 from its seven-office operation. Billings also include those of subsidiaries Soken Co. and Sogei Kobo Printing, both of Tokyo, and Sogei do Brasil, Sao Paulo, Brazil. All three are fully-owned.

Accounts

Gained: Toshiba electronic devices; Matsuda automobiles; Sanyo Securities; Dairy Queen fast-food; Sanshin Jutaku real estate and Nisseki housing.

Lost: Itoman trading; Sumitomo real estate sales; Daia Kensetsu housing.

Officers

Hirobumi Senoh, president; Y. Kojima and Y. Tanaka, sr managing dirs; H. Kubota, managing dir, mktg and intl office; S. Suzuki, M. Mayama, K. Inoue, S. Kasada and K. Kodama, managing dirs.

Headquarters

Sogei Co.
Daihyaku Seimei Kyobashi Bldg.
3-2-11 Kyobashi, Chuo-ku
Tokyo, Japan
Phone: 813-272-5041
Fax: 813-281-5771

RANK: 98

Standard Advertising

Tokyo
Gross income: **$18.1** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	18.1	17.7	2.2
Volume	146.0	138.4	5.5

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	189	186	1.6
Offices	3	2	50.0

Annual review

Continued pressure on billings growth will be felt in 1990 by the agency, which in 1989 recorded a year-to-year increase of 5.5%, down from double-digit growth in 1988. Growth in 1990 should be about 5% in billings. Subsidiary Standard McIntyre K.K., specializing in medical advertising and half-owned by the parent company, contributed $3.9 million to Standard's total 1989 billings. Standard also holds 45% of Talkback Japan and 30% of Image Communication K.K., a production subsidiary, both in Tokyo.

Accounts

Gained: Airbus Industrie, Fuji Bank, Hattori Seiko, Marumiya Shokuhin Dagyo, Mitsubishi Electric, Nomura Securities, Seiko Epson Corp, Sony Corp, Sony Energytech, Ysauda Life Insurance.

Officers

Kenkichi Oki, chmn-ceo; Tetsuo Horiguchi, president-coo; Tetsuya Kudo, sr managing dir, financial div; Toru Nihei, sr managing dir, business div; Sakae Takeda, managing dir, business div; Michiya Yamamoto, dir-creative div exec; Hiromasa Kawabata, dir-intl div exec; Koichi Kaneishi, dir-subsidiary div exec; Takashi Morioka, promo div exec; Akira Ebisawa, media div exec.

Headquarters

Standard Advertising Inc.
C.P.O. Box 910
Tokyo, Japan
Phone: 813-434-8181
Fax: 813-5470-1620

RANK: 28

TBWA Advertising

New York
Gross income: **$123.7** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	123.7	97.4	27.0
Volume	827.0	671.9	23.1
U.S.			
Gross income	33.2	23.1	43.8
Volume	221.6	154.1	43.8

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	905	816	10.9
Offices	16	15	6.7

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
TBWA Advertising, New York	157.1
TBWA Advertising, St. Louis	64.5
Non-U.S. offices, location	**Billings**
ARVH Reklame & Marketing, Zaandam, Netherlands(NE)	21.2
TBWA Belgium, Brussels(MJ)	22.9
TBWA Groep, Amstelveen, Netherlands(MJ)	70.2
TBWA Italia, Milan(MJ)	127.4
TBWA-Espana, Madrid(MJ)	36.1
TBWA, Frankfurt(MJ)	118.7
TBWA, London(MJ)	78.7
TBWA, Paris(MJ)	130.5
TBWA, Zurich(MJ)	20.5

Annual review

More than 20% growth is projected in 1990 as a result of anticipated increases in business related in part to full-year activity from its launch of Graf Bertel Dominique, New York, and new agency acquisitions: Kerlick, Switzer & Johnson, St. Louis, and Greenwich, Conn.-based Posey Quest Genova in which TBWA took a 50% position. TBWA shifted $15 million in Beiersdorf and Sandoz consumer healthcare accounts to the latter in late 1989. Overall, the agency reported $40 million in billings gains from new business including acquisitions ($6 million Boatmen's Bank; $5 million in regional Taco Bell; $3 million Chase Manhattan and $2.5 million Steuben accounts). Existing clients increased their spending by $30.5 million to more than cover the $3 million in billings lost

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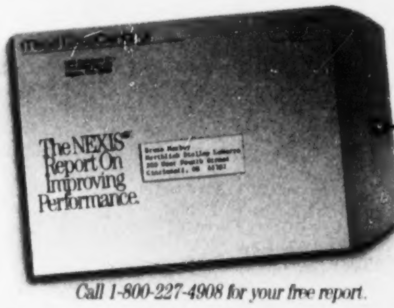

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with the departure of Parfums Stern ($2 million) and Germania Bank ($1 million). At the end of 1989, the agency announced plans to open offices in Australia and South Korea. Shortly after TBWA's buyout of the St. Louis agency, Daniel Kerlick, its chairman-ceo, died in a drowning accident.

U.S. accounts

Gained: Steuben Glass, Boatmen's Bank, Taco Bell—regional, Swissair, Swisshotel, Natori

Lost: Parfums Stern

Other network accounts

Gained: Beiersdorf (Nivea), Goldstar consumer electronics, Twinings tea, Toshioa portable computers, Eagle Snacks, Rowenta electrical appliances, Henkel (Sapur, Sofix, Perla), KPMG Peat Marwick (consultants), Avia athletic shoes

Lost: Bank Indosuez, Jade Cosmetics, La Previdente (insurance), Bahlsen (biscuits)

Officers

William Tragos, chmn-ceo; Richard Costello, president-coo; Michael Switzer, chmn-St. Louis; Arnold Arlow, Peter Lubalin, exec vp-co-creative dirs; Murray Gaylord, exec vp-dir, account svcs; James Quest, exec vp-group devel; John Doman, exec vp-business devel; Anthony Morgan, exec vp-strategic planning; Claude Fromm, exec vp-media director; Stuart Loss, exec vp-cfo, St. Louis; Arthur Gramer, James Jolliffe, exec vp-dirs, acct svcs; J.C. Dillon, exec vp-dir account plan

Headquarters

TBWA Advertising Inc.
292 Madison Ave.
New York, N.Y. 10017
Phone: (212) 725-1150
Fax: (212) 213-2869

RANK: 50

Telephone Marketing Programs

New York
Gross income: **$40.5** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	40.5	31.4	29.1
Volume	270.0	209.2	29.1
U.S.			
Gross income	37.8	29.6	27.9
Volume	252.1	197.1	27.9

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	736	736	0.0
Offices	22	24	(8.3)

Annual review

A strong push for new accounts brought $47.8 million billings in new business to the agency for the year as business from existing clients increased $15.2 million in billings. The agency, which recorded a 48.8% growth in international billings, lost only $8 million billings from departing clients for a net gain of $55 million in billings worldwide. The Yellow Page specialist agency with 17 global offices operates an "800" number fulfillment subsidiary that billed $1.7 million in 1989. Overall, growth of 15%-20% in billings is expected in 1990, slightly down from last year's 29%.

U.S. accounts

Gained: AutoZone, Avon Rent-A-Car, Baldwin Hardware, Coca-Cola, Credithrift Financial Services, CVS, Fotomat Corp., Grid Computers, Hitachi, Intelligent Electronics, KinderCare, Kinko's Service Corp., Lanier Business Machines; MCS Business Systems, Monroe Systems for Business, PacTel Cellular, Pratt & Lambert, RedMax, SmithKline-Beecham, TelPlus, UpJohn Healthcare Services

Lost: Control Data, EyeMasters, Jacuzzi, MobileCommunications, NTW, Red Lobster, Stomberg

Officers

Andrew McKelvey, president; Paul M. Camara, sr vp; Thomas G. Collison, vp-finance; Robert Lamb, vp-mktg; Harold Levy, sr vp-mktg, sales; Frank Troise, vp-operations; Bernice Hazell, vp-agency svcs

Headquarters

Telephone Marketing Programs, Inc.
1633 Broadway
New York, N.Y. 10019
Phone: (212) 977-4200
Fax: (212) 956-2142

RANK: 43

Armando Testa Group Worldwide

Milan
Gross income: $50.2 million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	50.2	47.7	5.2
Volume	349.4	323.4	8.1

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	420	410	2.4
Offices	13	11	18.2

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Armando Testa Inc., New York	10.5
Non-U.S. offices, location	**Billings**
Armando Testa, Barcelona(MJ)	8.0
Gruppo Armando Testa, Turin/Milan/Rome(MJ)	349.4
154-Testa, Paris	7.8

Annual review

Armando Testa experienced an 8.6% decline in billings in lira, fueled in part by the loss of Bistefani (biscuits) business and a decline in the lira exchange rate. The agency added two offices, giving it representation in Italy, U.S., Spain and France. Media Italia S.p.A., a unit specializing in special events, pr and sponsorship, contributed $49 million or almost one-fifth of total billings.

Accounts

Gained: Barilla Mulino Bianco (food), Schiapparelli Benessere Pikenz (cosmetics), Ministero della Sanita (AIDS), *Editoriale Domus* (magazine), Nestle's Sasso olive oil and Vismara meats

Lost: Bistefani

Officers

Armando Testa, chmn; Francesco de Barberis, Lidia de Barberis, vice chmn; Marco Testa, president-ceo. Exec vps—Eugenio Bona, finance; Mario de Barberis, diversification; Andrea Gavotto, intl; Silvano Guidone, creative

Headquarters

Armando Testa Group Worldwide
Via Washington 17
20146 Milan, Italy
Phone: 392-48 08 21
Fax: 392-48 00 82 06

RANK: 8

J. Walter Thompson Co.

New York
Gross income: **$626.4** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	626.4	559.3	12.0
Volume	4,407.5	3,857.5	14.3
U.S.			
Gross income	266.5	257.5	3.5
Volume	1,851.0	1,787.9	3.5

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	7,026	6,738	4.3
Offices	187	176	6.3

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Breuillard Communications, New York	65.0
J. Walter Thompson USA, Atlanta	56.0
J. Walter Thompson USA, Chicago	365.0
J. Walter Thompson USA, Detroit	449.0
J. Walter Thompson USA, Los Angeles	170.0
J. Walter Thompson USA, New York	461.9
J. Walter Thompson USA, San Francisco	140.0
Thompson Recruitment, Los Angeles	144.0
Non-U.S. offices, location	**Billings**
Adforce-J. Walter Thompson Co., Jakarta(NE)	10.5
Atlas Publicidad, Bogota(NE)	15.9
A.M.W. de Publicidad, Santiago(MN)	15.7
Corporacion/Thompson, Montevideo, Uruguay(NE)	5.5
Haupt-Stummer/J. Walter Thompson, Vienna(MJ)	17.3
Hindustan Thompson Associates, Bombay(NE)	63.6
JWT SA, Asuncion, Paraguay(MJ)	0.8
JWT Argentina, Buenos Aires(MJ)	126.3
J. Walter Thompson Australia, Sydney(MJ)	98.5
J. Walter Thompson Chilena, Santiago(MJ)	25.5
J. Walter Thompson Co., Bangkok(MJ)	12.1
J. Walter Thompson Co., Brussels(MJ)	46.3
J. Walter Thompson Co., Copenhagen(MJ)	8.5
J. Walter Thompson Co., Frankfurt(MJ)	145.5
J. Walter Thompson Co., Hong Kong(MJ)	48.9
J. Walter Thompson Co., London(MJ)	568.4
J. Walter Thompson Co., Madrid(MJ)	164.3
J. Walter Thompson Co., Manila(MJ)	21.7
J. Walter Thompson Co., Paris(MJ)	71.7
J. Walter Thompson Co., Stockholm(MJ)	14.1
J. Walter Thompson Co., Toronto(MJ)	162.5
J. Walter Thompson Co., Zurich/Lucerne(MJ)	24.2
J. Walter Thompson de Mexico, Mexico City(MJ)	37.7
J. Walter Thompson de Venezuala, Caracas(MJ)	21.2
J. Walter Thompson Italia, Milan(MJ)	257.3
J. Walter Thompson Japan, Tokyo(MJ)	204.3
JWT New Zealand, Wellington, N.Z.(JV)	25.2
J. Walter Thompson Peruana, Lima(MJ)	13.4
J. Walter Thompson Publicidade, Lisbon(MJ)	40.4
J. Walter Thompson Publicidade, Sao Paulo(MJ)	84.4
J. Walter Thompson Singapore, Singapore(MJ)	16.3
JWT South Africa, Johannesburg(MN)	28.0
J. Walter Thompson Taiwan, Taipei(MJ)	20.2
Manajans/Thompson, Istanbul(MN)	20.6
Marti, Flores, Prieto & Wachtel, San Juan(MN)	52.4
Norlop-Thompson Asoc., Guayaquil, Ecuador(MN)	9.6
PPGH/JWT Group, Amsterdam(MJ)	117.7
PTM Thompson Adv., Kuala Lumpur, Malaysia(MN)	15.9
Schjaerven/J. Walter Thompson Co., Oslo(NE)	10.8
Spot/Thompson Advertising, Athens(MN)	37.8
Tehomainos-J. Walter Thompson Oy, Helsinki(NE)	22.3
Thompson (Lanka), Colombo, Sri Lanka(MN)	2.7

Annual review

in U.S. billings but a hearty 23.5% growth abroad. Big domestic gains included Goodyear ($40 million), Snapper Power Equipment ($24 million), Lever Bros.' Wisk ($13 million) and Circuit City Stores ($25 million). Abroad, the agency gained the $20 million account for Repsol, Spain's state-owned oil company, but lost Benson & Hedges in Australia ($7 million) after 27 years. In early 1990, the agency lost its year-old account, Eyelab ($12 million), when it was bought by Pearle, lost the $35 million Deutsche Bank (Frankfurt) media-buying account, and was a leading contender for the $50 million Continental Airlines business. On the international side in 1989, JWT joined Omnicom Group and Ogilvy & Mather as partners in Media Partnership, a European media-buying consortium, built up its equity from 25% to 70% in the Malaysia office and expanded the Melbourne, Australia office. Among personnel changes abroad, where the agency added 288 more employees and 11 offices, Dominique Simonin was named chmn-ceo for European operations and Miles Colebrook moved to president-coo of the same. In South Africa, 13 employees resigned over a disagreement with the future direction of the agency there. The Chicago office fired 12 and hired five new members of its creative staff. JWT is owned by WPP Group PLC, London.

U.S. accounts

Gained: Bell Atlantic, Chesebrough-Pond's, Circuit City, Eyelab, Fisher-Price, Gerber, Goodyear, Health & Tennis, Jenny Craig Intl, Lever Bros., NutraSweet, Quaker Oats, Ragu, Reynolds, Snapper Power Equipment, Sun Microsystems

Lost: Eyelab, S.C. Johnson

International accounts

Gained: Europe—Austrian Mint, DSB State Railroads, Jack Daniels & Southern Comfort, COIN dept store, Johnnie Walker Red and Black Label, Repsol, Nestle/Findus, Allied/Lowenbrau Strong Lager, Matteson Walls, British Telecom/-intl; Latin America—Swift-Armour S.A., Ripley dept store, Schering-Plough; Asia/Pacific—Computerized Solutions, RJR/Vantage Cigarettes, Kellogg, Camus Cognac, Citibank, Pepsico; Canada—Canadian Airlines

Lost: Europe—Emery Air Freight; Asia/-Pacific—Lufthansa, Benson & Hedges

Officers

Burt Manning, chmn-ceo; Peter Schweitzer, vice chmn, agency oper; William C. Thompson Jr, vice chmn, client oper; Exec vps—Edward A. Haymes, finance & admin; James K. Agnew, exec vp-USA; Stephen G. Bowen, president-USA; Julian Bravo, president-ceo-S. America (Spain); Ronald S. Burns, ceo-N. America; Miles Colebrook, president-ceo-Europe; Manuel de Elexpuru, chmn-S. America (Spain); Alan Fairnington, area dir-S. and E. Asia; Marlene Hore, vice chmn-Canada; William M. Lane, exec vp-USA; Norman A. MacMaster, president-Asia/-Pacific; Bertram Metter, chmn-USA; James B. Patterson, chmn-N. America; W. Lee Preschel, chmn-Latin America/-Asia/Pacific; Robin L. Restall, dir multinational client svcs-Latin America/S. Africa/Asia Pacific; Dominique Simonin, chmn-ceo-Europe; Donald G. Sullivan, vice chmn-USA; Allen Thomas, chmn-UK; John F. Tukey, exec vp-USA; Alan W. Webb, exec vp-USA

Headquarters

J. Walter Thompson Co.
466 Lexington Ave.
New York, N.Y. 10017
Phone: (212) 210-7000
Fax: (212) 210-7034

RANK: 21

Tokyu Agency

Tokyo
Gross income: **$156.2** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	156.2	134.6	16.0
Volume	1,259.4	1,115.2	12.9

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

Annual review

The agency predicts 19% growth in 1990 due to positive movement in the Japanese economy in general. In 1989, Tokyu became the only Japanese agency to partially own a communications medium when it co-sponsored "Power Channel," a satellite TV channel.

Officers

Wakabayashi, Michiaki Oka, sr managing dirs; Hideo Jinbo, Isamu Matsumura, Hideo Matsuyama, managing dirs.

Headquarters

Tokyu Agency Inc.
4-8-18 Akasaka, Minato-ku
Tokyo 107, Japan
Phone: 813-404-5321
Fax: 813-401-7918

RANK: 59

Tokyu Agency International

Tokyo
Gross income: **$34.9** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	34.9	30.3	15.0
Volume	272.4	233.5	16.7

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	311	279	11.5
Offices	3	3	0.0

Annual review

Growth in 1990 is estimated at 7.4%, influenced in part by local account growth and business emanating from the new venture, Tokyu Eastern International Inc. (Taiwan), established in October 1989, with Eastern Advertising Ltd.

Accounts

Gained: Prima Meat Packer (sausages), Sunkus Co. (convenience stores); S.C. Johnson (car care prods); World Gold Council

Lost: Esso Sekiyu petroleum prods.

Officers

Masao Sawaki, chmn; Yuimimiko Nagai, president; Masakatsu Obata, exec vp; Hichinosuke Yoshioka, Esuke Yoshida, exec dirs; Akira Yamaguchi, Andrew Salzman, managing dirs.

Headquarters

Tokyu Agency International
4-9-17, Akasaka, Minato-ku
Tokyo 107, Japan
Phone: 813-470-1611
Fax: 813-423-3713

RANK: 70

Warwick Baker & Fiore

New York
Gross income: **$25.5** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	25.5	24.0	6.3
Volume	170.0	160.0	6.3
U.S.			
Gross income	25.5	24.0	6.3
Volume	170.0	160.0	6.3

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

Annual review

Warwick Advertising, which changed its name to Warwick Baker & Fiore, experienced a net billings growth of $10 million, including $8 million in billings each from new and existing accounts (including new products from Sterling Drug and Van Munching) while losing $6 million from clients exiting the shop. Cautiously optimistic about the economic climate, the agency projects growth in 1990 to be 4%-6%, slightly shy of 6.3% in 1989. Warwick is 40% owned by Alliance International, an international network of agencies that is owned by Lopex PLC.

U.S. accounts

Gained: West Point Pepperell (Martex, Utica, Tastemaker, Lady Pepperell), East Coast Energy Council, Sterling Drug (new prods), Van Munching (Buckler non-alcoholic beer), Benjamin Moore Dealers.

Lost: Pfizer Inc. (Coty), Radio Advertising Bureau, Smithsonian

Officers

John P. Warwick, chmn; Wilder D. Baker, president-ceo; Robert J. Fiore, vice chmn-chief creative officer; Dennis Visich, group exec vp-coo; Susan Small-Weil, exec vp-dir strategic planning; Ronald S. Fierman, exec vp-finance & admin; John J. Meskil, exec vp-media; Jerry Prestomburgo, exec vp-creative dir; Michael A. Haggerty, group sr vp-media dir; Alden Ludlow, III, group sr vp-mgr creative svcs

Headquarters

Warwick Baker & Fiore
100 Avenue of the Americas
New York, N.Y. 10013

RANK: 26

Wells, Rich, Greene

New York
Gross income: **$132.5** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	132.5	125.1	5.9
Volume	885.0	835.9	5.9
U.S.			
Gross income	132.5	125.1	5.9
Volume	883.0	833.9	5.9

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	NA	NA	NA
Offices	NA	NA	NA

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Wells, Rich, Greene, Chicago	62.0
Wells, Rich, Greene, Los Angeles	32.0
Wells, Rich, Greene, New York	789.0
Wells, Rich, Greene, St. Louis	NA

Annual review

With new business up $79.7 million, which includes major billings contributions from Sheraton Corp. hotels and Hertz Corp. ($25 million each), the agency more than offset lost billings from Folgers Gourmet Supreme coffee ($10 million) and Procter & Gamble's Sure deodorant ($18 million). WRG did keep P&G's Gain, Spic 'n Span, Pringles, Oil of Olay and added new unnamed products. WRG also won Polo/Ralph Lauren account ($10 million) and Wedgwood ($2 million). It closed the St. Louis-based Gardner Advertising with reported $106 million billings (mostly from Advanswers Media/Programming media buying service) after losing Ralston Purina ($10 million) and Southwestern Bell Yellow Pages ($12 million) accounts. Gardner president Paula Kahn became exec vp-new business in the New York office and Gardner's remaining accounts—Mazzio's Corp. (pizza) and Southwestern Bell Mobile Systems worth a combined $3 million—were absorbed into the Chicago office. Additional business from existing clients included Warnaco's Ungaro line and MCI Communications residential and international products. WRG survived an unofficial agency review in early 1990 by Philip Morris and retained its $40-$60 million Benson & Hedges cigarette account.

U.S. accounts

Gained: Sheraton Corp. Hotels, Hertz Auto Rentals, Dun & Bradstreet Business Credit Services, S.D. Warren Paper Co.

Lost: Cadbury Beverages, Wedgwood China, Polo/Ralph Lauren, Sure Deodorant, Folgers Gourmet Supreme Coffee, *Cosmopolitan* magazine trade advertising, Ralston Purina, Southwestern Bell Yellow Pages.

Officers

Mary Wells Lawrence, chmn-ceo; Charles Moss, vice chmn-corp creative officer; Bill Benton, vice chmn; Tom Fagan, exec vp-finance and treasurer; Katherine Durham, sr vp-admin and pr; Richard Freedman, sr vp-finance and asst treasurer; Stanley Haspel, sr vp-legal and secretary; Ely Drogin, sr vp; Kathryn Bryan, sr vp-financial planning; Phyllis Cerf Wagner, sr vp. WWG/Worldwide: Kenneth Olshan, chmn; Mary Moore, vice chmn-chief creative officer; Richard Hopple, president; Dick Macedo, president, WRG/West and president, WRG/-Entertainment; Larry Singer, president, WRG/Chicago; Jim Lawrence, exec vp-managing dir/Detroit; Richard Cohen, Jayne Eastman, exec vps-dirs, mktg and strategic planning. WRG/NY: Richard Cohen, Jayne Eastman, exec vps-dirs, mktg and strategic planning; Steve Farella, exec vp-dir, corp media svcs; Chris Hansen, exec vp-dir, The Image Group. WRG/Detroit: Bill Benton, vice chmn; Jim Lawrence, exec vp-managing dir. WRG/Chicago: Larry Singer, president; William McCann, exec vp. Advanswers: Donald A. Stork, president; John L. Marlow, sr exec officer. Paul Schulman Co.: Paul Schulman, president.

Headquarters

Wells, Rich, Greene Inc.
9 West 57th St.
New York, N.Y. 10019
Phone: (212) 303-5050
Fax: (710) 581-5035

RANK: 92

Wyse Advertising

Cleveland

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	19.9	15.7	26.5
Volume	140.4	105.8	32.8
U.S.			
Gross income	19.9	15.7	26.5
Volume	140.4	105.8	32.8

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	275	231	19.0
Offices	3	2	50.0

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Wyse Advertising, Cleveland	128.7
~~**Wyse Advertising**, Indianapolis~~	~~0.6~~
Wyse Advertising, New York	11.1

Annual review

Personnel shifts were in the forefront of change at the agency whose existing roster boosted its billings a collective $21.7 million, including the consolidation of the $5 million Integra Financial Corp. account. A $15.8 million increase in new business also more than offset $2.9 million in lost billings. At midyear, Mike Marion and Carl Camden were promoted to co-presidents from exec vp-creative dir and exec vp-account planning respectively, succeeding Marc Wyse who remained ceo of parent Wyse Advertising. In August, Allan Gardner resigned as president of Wyse's New York office. John Lippmann, exec vp-account svcs, took over general management duties.

U.S. accounts

Gained: Seiko Mead Co., Master Builders Technologies.

Lost: Edward D. Jones, Genie Garage Door Openers, Clairol, Drake Bakeries, SVO division of Lubrizol.

Officers

Marc A. Wyse, chmn; Lois Wyse, president; James B. Rucker Jr., vice chmn; Evelyn Reisz, secretary-treasurer; Thomas Nipper, cfo.

Headquarters

Wyse Advertising Inc.
24 Public Square
Cleveland, Ohio 44113
Phone: (216) 696-2424
Fax: (216) 621-2950

RANK: 84

Yellowhammer Advertising

London
Gross income: **$21.3** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	21.3	17.4	22.4
Volume	141.8	115.9	22.4

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	150	144	4.2
Offices	NA	NA	NA

Annual review

Yellowhammer, a publicly held agency, entered extensive expansion plans on the Continent in 1989 opening up Yellowhammer Balades in Spain and Yellowhammer Delafosse in France. Other countries are targeted. However, despite its heavy billings output—up 22.3% from 1989—rapid expansion squeezed the bottom line. The agency exited the year in the red.

Accounts

Gained: Wardair (Canadian airline), Electricity Council, Allied Breweries (strategies for non-advertised brands).

Officers

Jon Summerill, chmn; Andrew Bethell, dep chmn; Tim Lefroy, chief exec; Patrick Woodward, creative dir.

Headquarters

Yellowhammer Advertising
76 Oxford St
London WIA IDT, England
Phone: 441-436-5000
Fax: 441-436-4630

RANK: 31

Yomiko Advertising

Tokyo
Gross income: **$100.3** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	100.3	90.0	11.5
Volume	753.5	660.3	14.1

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	699	685	[illegible]
Offices	14	13	[illegible]

Annual review

Yomiko Advertising, Tokyo, projects an 11% increase in billings (in yen) for 1990. The Japanese government is requiring that local industries expand their domestic rather than foreign markets, according to the agency, which should mean expanded local advertising and sales promotion budgets by Yomiko's clients.

Accounts

Gained: B&W Tobacco; Swiss Air-Japanese market; Talbots, Japan.

Officers

Toshio Kuroki, president; Yasumoto Amano, Makoto Toriyama and Ko Ogata, sr managing dirs; Kiyoaki Yamamoto and Iseo Miyazawa, managing dirs; Takashi Okuno, Shimpei Koyanagi, Seiichi Sugimoto and Tomoya Noda, dirs.

Headquarters

Yomiko Advertising Inc.
8-14 Ginza 1-chome, Chuo-ku
Tokyo 104, Japan
Phone: 813-563-7889
Fax: 813-564-0170

RANK: 3

Young & Rubicam

New York
Gross income: **$865.4** million

Income & volume ($ in millions)

Worldwide	1989	1988	% chg
Gross income	865.4	757.6	14.2
Volume	6,250.5	5,390.3	16.0
U.S.			
Gross income	409.5	372.8	9.9
Volume	3,114.8	2,791.8	11.6

Workforce & facilities

Worldwide	1989	1988	% chg
Employees	10,473	12,311	(14.9)
Offices	322	265	21.5

Office billings in 1989 ($ in millions)

U.S. offices, location	Billings
Burson-Marsteller (media-related billings), New York	826.8
Cato Johnson Worldwide, Chicago	56.1
Cato Johnson Worldwide, Detroit	5.5
Cato Johnson Worldwide, Los Angeles	6.2
Cato Johnson Worldwide, New York	51.9
Cato Johnson Worldwide, Rochester, N.Y.	31.0
Chapman Direct Advertising, New York	48.2
CMF&Z, Cedar Rapids, Iowa	90.5
HDM*, Chicago	49.5
HDM, Los Angeles	101.5
HDM, New York	96.2
Sudler & Hennessey, New York	164.1
Wunderman Worldwide, Arkansas	9.8
Wunderman Worldwide, Detroit	30.3
Wunderman Worldwide, New York	211.1
Wunderman Worldwide, San Francisco	11.2
Arthur Wilk, Chicago	14.7
Sive Associates, Cincinnati	29.5
Stone & Adler, Chicago	NA
Young & Rubicam, Chicago	78.0
Young & Rubicam, Detroit	211.5
Young & Rubicam, New York	1,274.3
Young & Rubicam, San Francisco	111.5
Non-U.S. offices, location	**Billings**
Advico Young & Rubicam, Zurich(MJ)	118.6
Funes, Straschnoy, Dreyfuss Y&R, Buenos Aires(MN)	81.5
Geo/Young & Rubicam, Athens	8.5
HDM**, Europe/Asia-Pacific	2,308.2
JMC Creatividad/Young & Rubicam, Caracas(NE)	19.6
Lahden Taucher, Lahti, Finland(NA)	3.9
Michael Hogg/Y&R, Harare, Zimbabwe(MN)	2.2
Oy Taucher Y&R, Helsinki(MN)	33.3
PMSvW/Young & Rubicam, Amsterdam(MJ)	156.1
Reklamevi, Istanbul(NE)	9.0
Scaneco-Young & Rubicam, Oslo(MJ)	83.4
Tamperenn Taucher Oy, Tampere, Finland	3.5
Team Young & Rubicam, Lisbon(MN)	23.7
Wunderman Worldwide, 20 global offices	221.3
Young & Rubicam Belgium, Brussels(MJ)	49.8
Young & Rubicam Damaris, Santo Domingo(MJ)	8.2
Young & Rubicam de Chile, Santiago(MJ)	4.7
Young & Rubicam do Brasil, Sao Paulo(MJ)	81.0
Young & Rubicam Espana, Madrid(MJ)	144.6
Young & Rubicam France, Paris(MJ)	374.0
Young & Rubicam Holdings, London(MJ)	550.5
Young & Rubicam Hungary, Budapest	5.8
Young & Rubicam Italia, Milan(MJ)	383.4
Young & Rubicam Puerto Rico, San Juan(MJ)	41.8
Young & Rubicam South Africa, Cape Town(MJ)	57.2
Young & Rubicam Zambia, Lusaka, Zambia(MJ)	2.1
Young & Rubicam, Mexico City(MJ)	23.0
Young & Rubicam, Stockholm(MJ)	132.6
Young & Rubicam, Auckland(MJ)	18.2
Young & Rubicam, Copenhagen(MJ)	63.7
Young & Rubicam, Frankfurt(MJ)	263.9
Young & Rubicam, Sydney(MJ)	202.8
Young & Rubicam, Toronto(MJ)	154.6
Young & Rubicam, Vienna(MJ)	40.7

Annual review

Y&R's billings growth in 1989 of 16% worldwide outpaced its 1988 growth rate of 9.9% as the agency gathered in sizable new business including Camel cigarettes ($25 million) from R.J. Reynolds Tobacco and First Nationwide Financial Corp. ($15-$20 million) domestically and in Europe with Quaker's Gatorade ($20 million) launch, Reckitt & Colman's Airwick air freshener ($17 million pan-Europe), British Gas ($18-$20 million) and Johnson & Johnson Carefree sanitary product line ($10 million in 11 European markets). Big losses included Mulino Bianco's Barilla foods ($44 million), Pillsbury Brands Group ($4.8 million) and Jamaica Tourism Board ($6-$8 million). The latter resulted in plea bargaining on federal racketeering and bribery charges and management reshuffling. Y&R settled with WPP which had sued Y&R for its role in the management breakaway at LGFE, New York. Y&R contributed 49% equity to the breakaway agency, Lord, Einstein O'Neill & Partners. Y&R sold Stone & Adler, Chicago, to HDM; reorganized its Detroit office into automotive and diversified account divisions; bought interest in GEO II, Athens, Greece; merged its Impact Italia with Dolci MC to form Impact Dolci; acquired 40% of Skala Recklam Studio, Budapest; finalized plans for a pan-European, media-buying operation with other agency partners including HDM; bought Hall & Cederquist, Stockholm, to be merged with an existing Y&R agency; dissolved its partnership, Fischer, Justus, Y&R Brazil; bought Landor Associates, design company, and opened a Minneapolis satellite office. In early 1990 Tim Pollak was named president-ceo of Y&R's New York office, succeeding Arthur Klein who becomes managing director for joint venture operations. Mr. Pollak was succeeded by Gary Burandt as HDM Worldwide ceo. Mr. Burandt was ceo-Y&R Sovero, Moscow. Effective May 1, Peter Georgescu, Y&R Advertising president, becomes president of Y&R Inc., succeeding Alexander Kroll who continues as chairman-ceo. Joseph De Deo, Y&R Europe president, succeeds Mr. Georgescu.

*Y&R claims only 30% of HDM billings in the U.S. or $74.1 million.

**Y&R claims 29% of HDM Europe and 40% Asia-Pacific or $747.3 million.

U.S. accounts

Gained: Anacin, Co-Advil (American Home Products/Whitehall Labs); Auchan (dept store), Camel cigarettes (RJR Tobacco), Citizen Watch Co. of America, Conagra Turkey, First Nationwide Savings, Heublein, Interactive Game Network, LJN Toys, Motorola, Northrup King, Townsend Chickens, Vegisnax (Freshworld).

Lost: Goodyear Tire & Rubber Co., Jamaica Tourist Board, Pillsbury Pizza, Pioneer Hi-Bred International.

International accounts

Gained: Reckitt & Colman (air fresheners)—Europe; Searle Canderel Sweetener—Europe; Quaker Gatorade—Europe; Johnson & Johnson (Carefree)—Europe; Jacobs Suchard—Amsterdam (Cote d'Or).

Officers

Alexander Kroll, chmn-ceo, Y&R Inc.; Peter Georgescu, president Y&R Inc. (effective 5/1/90); Joseph De Deo, exec vp-president (5/1/90), Y&R Advertising; Harold Burson, chmn, Burson-Marsteller; James Dowling, exec vp-president-ceo, Burson-Marsteller; Lester Wunderman, chmn, Wunderman Worldwide; R. John Cooper, exec vp-general counsel-secretary, Y&R Inc.; Roger Craton, exec vp-cfo, Y&R Inc.; Roby Harrington, exec vp, Y&R Inc., chmn U.S. National Group; Arthur Klein, managing dir joint venture operations, John P. McGarry, exec vp-chmn client svcs worldwide, chmn Y&R New York; Gary Burandt, exec vp-ceo, HDM; Don Casey, president-ceo, Landor Associates; Alan J. Sheldon, sr vp-dir business affairs worldwide; Larry E. Snoddon, president/B-M Europe.

Headquarters

Young & Rubicam Inc.
285 Madison Ave.
New York, N.Y. 10017
Phone: (212) 210-3000
Fax: (212) 490-6397

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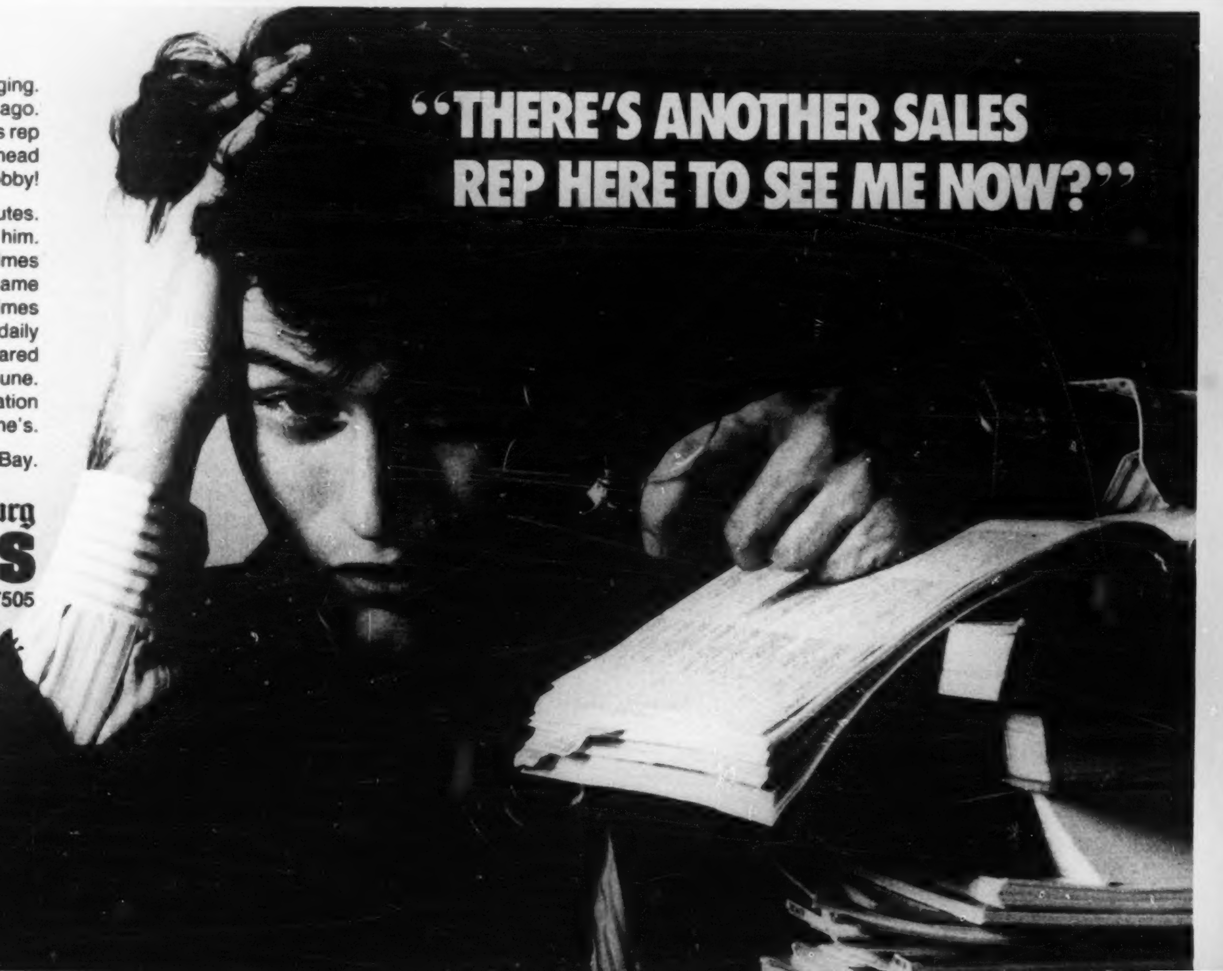

"THERE'S ANOTHER SALES REP HERE TO SEE ME NOW?"

U.S. winner: Goodby

Past winners: U.S.

1988—Chiat/Day
1987—Leo Burnett Co.
1986—Foote, Cone & Belding
1985—Hill, Holliday, Connors, Cosmopulos
1984—BBDO
1983—Fallon McElligott Rice
1982—Ogilvy & Mather
1981—Ally & Gargano
1980—Chiat/Day
1979—Henderson Advertising
1978—(tie) N W Ayer
Young & Rubicam
1977—Needham Harper Worldwide
1976—DKG Advertising
1975—Leo Burnett Co.
1974—Scali, McCabe, Sloves
1973—Cunningham & Walsh

Advertising Age's annual selection of Agency of the Year is based on evaluations, by a committee of our editors, of the creative product of the nominated agencies. Creativity, rather than size or new-business success, is given primary consideration to allow agencies of all sizes to compete.

Nominations are made by *Ad Age* staff members; consideration is also given to nominations put forth by others, including the agencies themselves. ☐

(Continued from Page S-4)

ment in which people could create their best work," Mr. Berlin said —after they had moonlighted together on a project while working at Ogilvy.

They were all creatives: Messrs. Goodby and Berlin were copywriters and Mr. Silverstein an art director. But they rejected the conventional wisdom that start-ups should have at least one "suit," or heavy-hitting account person.

Relying on their instincts and a computer accounting program of dubious accuracy put together by Mr. Berlin, the three thought they could make money as well as great ads.

The agency attracted clients by assuring them one of "the guys"—now called "the partners"— would be intimately involved in the work.

Now, with 15 clients and 60 employees, that's not as easy, but "we still run the place," Mr. Goodby said. "We still have the ideas behind the work."

Despite its innovative creative product, which has helped it serve as a model for other new agencies, Goodby has struggled on the business side.

"I understand they haven't felt they've achieved their financial goals," Mr. Riney said.

"Where's our big national client?—ask me that," said Mr. Silverstein, conceding the agency isn't as big as it thought it would be by now.

The agency thought it had landed that big national account last September, when it won the Pioneer Electronics business, but the agency and client weren't compatible and the relationship ended within two months.

"We weren't the right agency for Pioneer," Mr. Berlin said.

The agency also tried to grow through an infusion of funds from London-based Boase Massimi Pollitt, to which Goodby sold a one-third interest. But BMP subsequently was acquired by Omnicom Group, New York, from which Goodby is negotiating the repurchase of its stock.

The agency believes it found the the right "suit"—now conceded to be necessary—last August, when it hired Colin Probert, 43, former president of BMP North America, as its president.

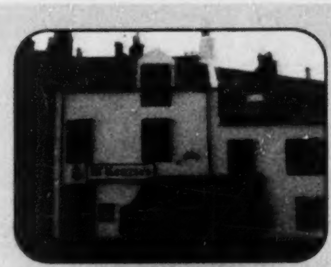
Early this year, the agency restructured, giving Mr. Berlin sole responsibility for administration. Mr. Probert reports to Mr. Berlin.

"It's the end of three guys sitting in a room making all the decisions together," Mr. Berlin said.

But as Goodby seeks growth and becomes more businesslike, the agency insists it will maintain the delicate environment that's nourished it creatively.

A creative department, Mr. Goodby said, "has to have a certain amount of irreverence and brattiness and free-spiritedness. You hide it from the outside world as much as possible, but you guard it inside. If you get too predictable, it's real bad for your creative product, not to mention your life." ☐

U.S. Agency of the Year runners-up



Ammirati & Puris' campaign for UPS touts overseas service.

Bo Jackson stars in Wieden & Kennedy's Nike commercials.

Ammirati & Puris
New York

Overseas delivery service campaign for client UPS won the agency plaudits, along with continued high-quality print and broadcast advertising created for BMW, Club Med, Schweppes and Aetna.

Wieden & Kennedy
Portland, Ore.

Cited for its imaginative and wide-ranging work for Nike, including the famous "Bo knows" television commercials featuring sports superstar Bo Jackson. Also cited: Work for KINK Radio, Pepe Sportswear and Oregon tourism. ☐

Int'l winner: Contrapunto

(Continued from Page S-5)

painting, effectively showing all Nugget's colors.

The element of surprise pops up again in a commercial for the National Institute for Social Affairs, a government program encouraging elderly people to travel in the off-season.

In one spot, a suitcase is thrown onto a bed and the shapely legs of a woman in a skirt and high-top tennis shoes scurry around the bedroom. As a silk blouse, makeup and jeans are packed in the case, voice-over says, "If you're independently minded . . . this winter, leave home. Now you're old enough."

In the end, viewers discover the sneakers are worn by a spunky silver-haired lady on the go.

In contrast to this approach, sometimes simplicity is the key. In a spot encouraging Spaniards to vote in last year's European Parliament elections, children of different nationalities sing the European Community's anthem in the middle of a government hall.

As the spot closed on the EC symbol, the point became clear: "Vote with Europe."

Another simply told message is a commercial for Epilady. The agency chose a single image, a fresh peach, to show the product's function; the hair remover takes the fuzz off a peach without harming the fruit.

The story of Contrapunto's success is also being told by its gross income and billings growth.

Gross income hit $11.8 million in 1989 while billings reached $78.8 million, both up 15% from 1988.

The agency's most recent new-business coup was the $14.3 million Spanish Alfa Romeo car account, won last October from WPP Group's Conquest Europe.

"Alfa Romeo will be a big test for the agency," said Tomas Corominas, general manager of Contrapunto's Madrid office. Spain is Alfa Romeo's second-largest market after its home country, Italy.

The agency is developing Alfa Romeo's first TV campaign for Spain, which may be used in other European markets.

"We're hoping to work on all of Alfa Romeo's pan-European advertising, but we have to go step by step," Mr. Mancebo said.

Just as the agency openly refuses to handle assignments with strict predetermined guidelines on creativity, Contrapunto also rejects the organizational structure of traditional agencies.

"We believe in democracy in business—that's why we have chosen a horizontal structure, rather than a vertically organized company," Mr. Marcos said.

Contrapunto is run by a management team made up of its three founding members, each owning 10%. In addition to Mr. Marcos, the co-founders are Rafael Sarro, ceo, and Jose Garcia, a member of the executive managment committee.

Despite such titles as president, no one is dominant over the others.

"All decisions are made by majority," Mr. Marcos said.

Six other top executives also hold shares in the company.

"This gives you a solid base in a business as volatile as ours," Mr. Marcos said. ☐

Past winners: International

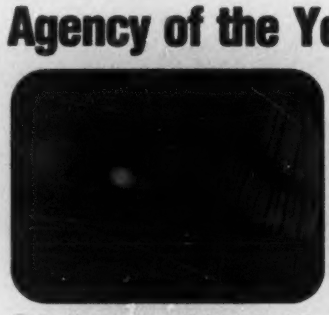
1988—DDB Needham, London
1987—Dentsu, Tokyo
1986—Mojo MDA, Sydney
1985—Lowe Howard-Spink Marschalk, London
1984—Prins, Meijer, Stamenkovits & van Walbeek, Amsterdam

Advertising Age's annual selection of International Agency of the year is based solely on the agency's creative product. Creativity, not a shop's size or success, is paramount. ☐

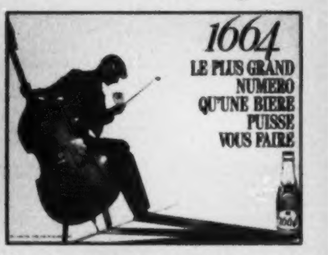
International Agency of the Year runners-up

Hakuhodo
Tokyo

Visually striking ads, such as spots for Matsushita Electric Industrial Co., propelled Hakuhodo to runner-up status. Judges were particularly impressed with innovative work for Meiji Mutual Life Insurance Co.'s dental insurance plan, humorously demonstrating potential dental catastrophes.



Twin fluorescent lights electrify the sky in this Matsushita Electric Industrial Co. spot.



Visual appeal attracts reader attention to this unusual beer ad. BDDP beautifully sells 1664 beer.

BDDP Group
Paris

Photography of TV spots that's as painstakingly crisp as art for its print ads earned BDDP its slot. Work for Kronenbourg's 1664 beer offers a series of memorable images; ads for Devanlay's Scandale lingerie feature titillating copy. ☐

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Top 10 by broadcast

Rank	Agency	Media billings 1989	Media billings 1988	Media billings % chg	Total billings 1989	Media % total billings 1989
Spot TV						
1	**Saatchi & Saatchi Advertising Worldwide**	$622.4	$639.0	(2.6)	$2,778.9	22.4
2	**Backer Spielvogel Bates** (C-M-E)	525.2	497.3	5.6	2,158.0	24.3
3	**Chiat/Day/Mojo**	471.0	362.0	30.1	785.0	60.0
4	**BBDO Worldwide**	413.9	411.9	0.5	2,656.0	15.6
5	**Foote, Cone & Belding Communications**	361.6	358.5	0.9	1,871.2	19.3
6	**D'Arcy Masius Benton & Bowles**	358.0	372.8	(4.0)	2,055.3	17.4
7	**Young & Rubicam**	342.0	407.6	(16.1)	3,114.8	11.0
8	**J. Walter Thompson Co.**	332.5	259.7	28.0	1,851.0	18.0
9	**Grey Advertising**	321.2	315.9	1.7	1,605.3	20.0
10	**DDB Needham Worldwide**	252.3	193.3	30.5	2,386.3	10.6
Network TV						
1	**Saatchi & Saatchi Advertising Worldwide**	$918.6	$913.8	0.5	$2,778.9	33.1
2	**Leo Burnett Co.**	855.1	703.6	21.5	1,945.3	44.0
3	**Backer Spielvogel Bates Worldwide**	845.7	767.0	10.3	2,158.0	39.2
4	**Young & Rubicam**	646.8	625.4	3.4	3,114.8	20.8
5	**D'Arcy Masius Benton & Bowles**	645.8	615.4	5.0	2,055.3	31.4
6	**Grey Advertising**	532.9	511.0	4.3	1,605.3	33.2
7	**Lintas:Worldwide**	532.3	504.8	5.5	1,499.9	35.5
8	**Ogilvy & Mather Worldwide**	512.4	479.0	7.0	2,104.4	24.4
9	**J. Walter Thompson Co.**	507.6	579.6	(12.4)	1,851.0	27.4
10	**BBDO Worldwide**	501.8	403.7	24.3	2,656.0	18.9
Cable TV						
1	**Saatchi & Saatchi Advertising Worldwide**	$72.2	$52.3	38.0	$2,778.9	2.6
2	**DDB Needham Worldwide**	60.3	NA	NA	2,386.3	2.5
3	**Foote, Cone & Belding Communications**	60.2	434.7	(86.2)	1,871.2	3.2
4	**Grey Advertising**	47.8	47.2	1.3	1,605.3	3.0
5	**D'Arcy Masius Benton & Bowles**	45.6	29.7	53.4	2,055.3	2.2
6	**Lintas:Worldwide**	43.9	40.7	7.9	1,499.9	2.9
7	**Leo Burnett Co.**	38.4	23.8	61.5	1,945.3	2.0
8	**Jordan, McGrath, Case & Taylor**	33.1	10.0	231.0	315.0	10.5
9	**Ogilvy & Mather Worldwide**	32.2	21.0	53.4	2,104.4	1.5
10	**Young & Rubicam**	32.0	60.6	(47.2)	3,114.8	1.0
Syndicated TV						
1	**Leo Burnett Co.**	$130.5	$106.4	22.6	$1,945.3	6.7
2	**D'Arcy Masius Benton & Bowles**	80.1	59.7	34.1	2,055.3	3.9
3	**McCann-Erickson Worldwide**	42.0	30.0	40.0	1,394.8	3.0
4	**Jordan, McGrath, Case & Taylor**	41.6	31.7	31.3	315.0	13.2
5	**Foote, Cone & Belding Communications**	40.0	NA	NA	1,871.2	2.1
6	**DDB Needham Worldwide**	29.1	NA	NA	2,386.3	1.2
7	**Wells, Rich, Greene**	27.0	21.7	24.4	883.0	3.1
8	**Young & Rubicam**	21.6	NA	NA	3,114.8	0.7
9	**Towne, Silverstein, Rotter**	10.0	4.0	150.0	83.0	12.0
10	**Burrell Communications Group**	7.0	4.2	66.4	60.3	11.6
Radio						
1	**BBDO Worldwide**	$138.4	$127.5	8.6	$2,656.0	5.2
2	**DDB Needham Worldwide**	132.3	92.4	43.1	2,386.3	5.5
3	**Backer Spielvogel Bates Worldwide**	131.6	123.6	6.5	2,158.0	6.1
4	**D'Arcy Masius Benton & Bowles**	101.5	76.4	32.8	2,055.3	4.9
5	**Bozell Inc.**	96.0	72.3	32.8	1,165.0	8.2
6	**Ogilvy & Mather Worldwide**	95.6	96.0	(0.4)	2,104.4	4.5
7	**McCann-Erickson Worldwide**	93.2	89.5	4.1	1,394.8	6.7
8	**Foote, Cone & Belding Communications**	93.1	87.0	7.0	1,871.2	5.0
9	**Saatchi & Saatchi Advertising Worldwide**	90.2	102.9	(12.3)	2,778.9	3.2
10	**Young & Rubicam**	78.6	82.6	(4.8)	3,114.8	2.5

Notes: Dollars are in millions. Total agency billings and billings by media include the billings of all subsidiary agencies included in the parent's total billings. Subsidiaries representing more than 50% of an agency's billings in a medium are shown in parentheses.

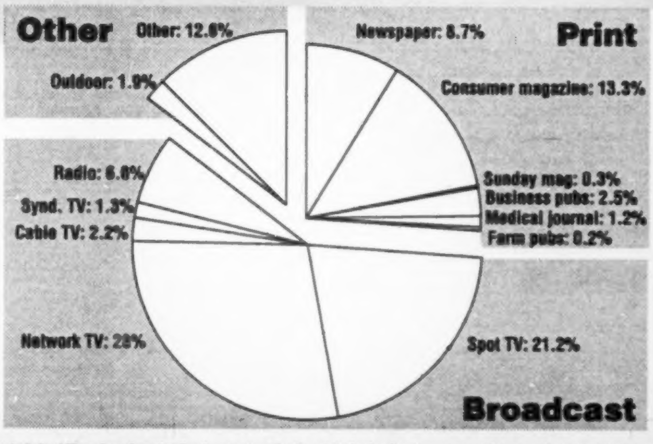
Top 10 by print media

Rank	Agency	Media billings 1989	Media billings 1988	Media billings % chg	Total billings 1989	Media % total billings 1989
Newspaper						
1	**DDB Needham Worldwide** (Bernard Hodes)	$240.5	$247.8	(3.0)	$2,386.3	10.1
2	**J. Walter Thompson Co.**	226.5	185.2	22.3	1,851.0	12.2
3	**BBDO Worldwide**	190.4	194.7	(2.2)	2,656.0	7.2
4	**Nationwide Advertising Service**	173.7	153.9	12.9	206.8	84.0
5	**Young & Rubicam**	144.4	107.6	34.3	3,114.8	4.6
6	**Saatchi & Saatchi Advertising Worldwide**	127.4	150.4	(15.3)	2,778.9	4.6
7	**Lintas:Worldwide**	127.0	124.4	2.1	1,499.9	8.5
8	**Grey Advertising**	102.8	99.6	3.2	1,605.3	6.4
9	**D'Arcy Masius Benton & Bowles**	94.5	70.8	33.4	2,055.3	4.6
10	**Backer Spielvogel Bates Worldwide**	92.3	101.9	(9.4)	2,158.0	4.3
Consumer magazine						
1	**Saatchi & Saatchi Advertising Worldwide**	$422.1	$362.4	16.5	$2,778.9	15.2
2	**Young & Rubicam**	280.7	248.5	12.9	3,114.8	9.0
3	**J. Walter Thompson Co.**	233.1	209.6	11.2	1,851.0	12.6
4	**Backer Spielvogel Bates Worldwide**	226.2	172.8	30.9	2,158.0	10.5
5	**DDB Needham Worldwide**	220.0	187.3	17.4	2,386.3	9.2
6	**Leo Burnett Co.**	207.4	221.5	(6.4)	1,945.3	10.7
7	**Bozell Inc.**	199.5	162.2	23.0	1,165.0	17.1
8	**Wells, Rich, Greene**	197.0	160.5	22.7	883.0	22.3
9	**Lintas:Worldwide**	191.4	178.2	7.4	1,499.9	12.8
10	**BBDO Worldwide**	187.9	182.4	3.0	2,656.0	7.1
Sunday magazine						
1	**Nationwide Advertising Service**	$22.7	$20.4	11.5	$206.8	11.0
2	**Lois/GGK New York**	10.0	10.0	0.0	99.7	10.0
3	**Ogilvy & Mather Worldwide**	9.9	2.0	396.7	2,104.4	0.5
4	**TBWA Advertising**	9.3	5.1	82.4	221.6	4.2
5	**Saatchi & Saatchi Advertising Worldwide**	8.5	2.6	222.9	2,778.9	0.3
6	**Valentine-Radford**	8.4	1.3	528.4	79.4	10.6
7	**Noble Communications**	6.5	7.3	(12.0)	80.1	8.1
8	**Ross Roy Group**	5.0	3.3	51.5	651.1	0.8
9	**Laurence, Charles, Free & Lawson**	4.9	5.4	(8.4)	275.2	1.8
10	**BBDO Worldwide**	4.3	2.4	80.6	2,656.0	0.2
Business publication						
1	**BBDO Worldwide**	$89.2	$62.8	42.0	$2,656.0	3.4
2	**Saatchi & Saatchi Advertising Worldwide**	54.3	24.9	118.2	2,778.9	2.0
3	**J. Walter Thompson Co.**	51.2	45.7	11.9	1,851.0	2.8
4	**Ketchum Communications**	43.7	36.9	18.5	854.9	5.1
5	**Young & Rubicam**	40.5	62.6	(35.3)	3,114.8	1.3
6	**Ogilvy & Mather Worldwide**	38.9	35.0	11.2	2,104.4	1.8
7	**McCann-Erickson Worldwide**	36.4	33.1	10.0	1,394.8	2.6
8	**Della Femina, McNamee/EWDB**	36.4	44.7	(18.7)	728.7	5.0
9	**Ingalls, Quinn & Johnson**	21.3	16.7	27.9	137.1	15.5
10	**Backer Spielvogel Bates Worldwide**	19.2	16.9	13.9	2,158.0	0.9
Medical journal						
1	**BBDO Worldwide** (Lavey/Wolff/Swift)	$69.3	$47.8	44.9	$2,656.0	2.6
2	**McCann-Erickson Worldwide**	65.0	60.0	8.3	1,394.8	4.7
3	**Saatchi & Saatchi Advertising** (Klemtner)	59.6	50.6	17.9	2,778.9	2.1
4	**William Douglas McAdams Inc.**	44.0	43.0	2.3	107.0	41.1
5	**Young & Rubicam** (Sudler & Hennessey)	35.1	35.1	(0.1)	3,114.8	1.1
6	**Dorritie & Lyons**	31.5	29.4	7.0	55.0	57.2
7	**Ketchum Communications**	26.0	7.9	227.1	854.9	3.0
8	**Foote, Cone & Belding Communications**	25.2	22.9	9.8	1,871.2	1.3
9	**Robert A. Becker EWDB**	25.0	21.6	15.6	50.0	50.0
10	**Gross Townsend Frank Hoffman**	20.0	25.0	(20.0)	78.4	25.5

Notes: Dollars are in millions. Total agency billings and billings by media include the billings of all subsidiary agencies included in the parent's total billings. Subsidiaries representing more than 50% of an agency's billings in a medium are shown in parentheses.

U.S. media billings by category

Media	Billings reported by 450 agencies 1989	Billings reported by 450 agencies 1988	Billings reported by 450 agencies % chg	Billings as % of annual totals 1989	Billings as % of annual totals 1988
Print					
Newspaper	$3,193.1	$2,904.7	9.9	8.7	8.8
Consumer magazine	4,866.0	4,191.2	16.1	13.3	12.7
Sunday magazine	107.9	81.9	31.7	0.3	0.2
Business publication	924.6	826.8	11.8	2.5	2.5
Medical journal	435.9	420.6	3.6	1.2	1.3
Farm publication	61.3	66.1	(7.3)	0.2	0.2
Broadcast					
Spot TV	7,769.1	7,119.6	9.1	21.2	21.5
Network TV	10,230.9	9,531.8	7.3	28.0	28.8
Cable TV	795.9	982.9	(19.0)	2.2	3.0
Syndicated TV	462.1	280.1	64.9	1.3	0.8
Radio	2,412.8	2,145.5	12.5	6.6	6.5
Other					
Outdoor	692.8	625.5	10.8	1.9	1.9
Other*	4,624.1	3,893.8	18.8	12.6	11.8



Notes: Dollars are in millions. Information in this chart is compiled from media breakouts supplied by 450 of the top 500 agencies reporting $36.6 billion in media billings. *Other includes billings from free-standing inserts, transit ads, point of sale, direct response, sales promotion, special events and Yellow Pages.

AA graphic: John Heiland; **AA chart:** Kevin Brown

U.S. agencies indexed by domestic gross income*

Agency	Gross income
Abelson-Taylor	$5,852
Ackerman, Hood, & McQueen	9,104
AC&R Advertising	45,829
Adams Colway & Associates	1,427
Adams & Longino Advertising	236
Ad Team	5,660
Adelante Advertising	924
Admarketing Inc	44,900
Advertising, Boelter & Lincoln	1,727
Advertising Communications	3,300
Advertising & Promotional Services	633
Advertising Works	3,150
AIM Inc	593
Ally & Gargano	37,000
Ammirati & Puris	29,500
Anderson & Lembke	6,400
Donald L. Arends Inc	1,617
Arian, Lowe & Travis Advertising	2,925
Arnold Advertising	6,176
Noble Arnold & Associates	944
Asher/Gould Advertising	13,957
Associated Advertising Agency	2,017
Aves Advertising	2,014
Avrett, Free & Ginsberg	15,546
Aydlotte & Cartwright	4,356
NW Ayer Inc	128,796
Babbit & Reiman Advertising	7,600
Backer Spielvogel Bates Worldwide	310,651
Bader Rutter & Associates	8,120
Bailey Lewis & Associates	1,966
Baker Advertising	2,605
Perry Ballard advertising	823
Barney & Patrick Advertising	1,943
Barnum & Souza	3,071
Baron & Zaretsky Advertising	2,723
Bauerlein	2,634
Baxter, Gurian & Mazzei	4,000
Bayer Bess Vanderwarker	16,028
BBDO Worldwide	373,595
Beaumont, Heller & Sperling	1,531
Robert A. Becker EWDB	7,400
Beckman Associates Advertising	1,592
Bentley, Barnes & Lynn	10,747
Berenson, Isham & Partners	3,279
Berenter Greenhouse & Webster	8,301
Berline Group	7,633
Shelly Berman Communicators	3,957
BHN Advertising & PR	2,494
William R. Biggs/Gilmore Associates	7,705
Blackwood Agency	208
Blair Advertising	3,026
Blake, Walls & Associates	1,514
Barry Blau & Partners	12,414
Bloom Cos	20,000
Bonneville Media Communications	4,254
Borders, Perrin & Norrander	7,261
Botto, Roessner, Horne & Messinger	3,898
Bozell Inc	155,400
Bradford Advertising & PR	205
Brady Co	3,590
Breakstone & Associates	54
Brett Associates Advertising	1,200
Brewster Advertising	409
Brouillard Communications	9,739
Earle Palmer Brown	40,100
E.H. Brown Advertising	2,375
Bryan Donald Advertising	504
Buntin Advertising	5,834
Burgess, Brewer, Stanyon & Payne	355
Leo Burnett Co	288,768
Burrell Communications Group	9,050
Lawrence Butner Advertising	3,816
Buyer Advertising	1,773
Cabot Communications	13,054
Campbell-Mithun-Esty	115,905
Campbell & Wagman	6,053
Capener Co	1,560
Caravetta Allen Kimbrough	2,615
Carmichael Lynch	12,116
Carrafiello-Diehl & Associates	10,450
Carter Callahan Advertising & PR	1,027
Cascino & Purcell	1,463
Cato Johnson Worldwide	22,568
Cedarcrest Advertising	182
Chaffee-Bedard	2,501
Chapman Direct Advertising	7,226
CHC Advertising	4,500
Chiat/Day/Mojo	106,000
Christopher Thomas/Muller Jordan Weiss	7,540
Clarion Marketing & Communications	18,804
Clarity Coverdale Rueff Advertising	3,200
Clarke Advertising & PR	184
George P. Clarke Advertising	1,076
Coakley Heagerty Cos	1,021
Cole Henderson Drake	2,000
Cole & Weber	11,856
Colle & McVoy	8,191
Communication & Design Agency	1,058
Communication Plus Advertising/PR	58
Conill Advertising	5,470
William Cook Agency	10,300
Frank J. Corbett	9,860
Cox Landey & Partners	5,250
CPA Inc	1,611
Cramer-Krasselt	15,825
Cranford Johnson Robinson Woods	3,928
Creative Alliance	2,825
Creel Associates	334
Creswell, Munsell, Fultz & Zirbel	13,574
Cross Keys Advertising	325
CTS Associates	400
Dailey & Associates	23,263
D'Arcy Masius Benton & Bowles	232,337
Davidoff White Good	3,801
Davis, Ball & Colombatto Advertising	16,800
Dawson Johns & Black	$1,950
DCA Advertising	12,842
DDB Needham Worldwide	302,936
Bonnie Dean Associates	301
Decker Rickard	3,600
Delfino Marketing Communications	1,049
Della Femina, McNamee EWDB	87,792
Detrow & Underwood	2,007
Deutsch Inc	11,266
Devon Direct Marketing & Advertising	9,600
DFK Advertising	555
Direct Marketing Group	25,700
DK Group	401
DMCA Direct	10,035
Doe-Anderson Advertising Agency	4,992
Donahoe & Purdhit	5,000
W.B. Doner	44,169
Doremus & Co	20,859
Dorland Sweeney Jones	4,550
Dorritie & Lyons	8,713
DPL Advertising	879
Dudnyk Co	3,550
Dudreck Depaul Ficco & Morgan	2,440
G. Duff Associates	339
Duffy & Shanley	2,704
Dugan/Farley Communications Associates	8,046
Dugan, Valva Associates	1,256
Duke Unlimited	996
Dusenbury & Alban	739
Eisaman, Johns & Laws	16,744
Eisner & Associates	6,760
Eikman Advertising	8,671
Emery Advertising	1,213
John Emmerling Inc	2,655
Eric Ericson & Associates	6,327
Esrock Advertising	1,540
Estey-Hoover	1,238
Evans Communications	24,000
Everett, Brandt & Bernauer	185
Exclamation Point	608
Fahlgren & Swink	23,608
Fallon McElligott	16,032
Thomas G. Ferguson Associates	20,588
Fern Hanaway	1,986
Ferrell-Cleary	635
Fessel, Siegfriedt & Moeller Advertising	3,603
Finnegan & Agee	3,137
Fischbein & Partners	856
Fitzgerald & Co	3,007
FitzSimons Advertising & PR	780
FKB direct	8,209
FKQ Advertising	1,489
Fletcher, Gampper & Wirth	1,403
Floathe & Associates	4,081
Fogarty & Klein	7,914
Food Group	3,611
Foote, Cone & Belding	280,536
Forsythe Marcelli Johnson Advertising	3,530
Fox MMJM Direct	3,063
Francioli Richartz Weiman & Fliss	1,770
Albert Frank-Guenther Law	6,255
Frankenberry, Laughlin & Constable	6,780
Furman Roth Advertising	1,604
Gann-Dawson	1,621
Gardiner-A Marketing Co	805
Gardner Communications	3,555
Gearon Hoffman Conlon & Nye	8,310
Geer, DuBois	19,500
Geoghegan/Griffiths	565
Gerber Advertising Agency	3,263
Gilbert, Whitney & Johns	4,745
Girgenti, Hughes, Butler & McDowell	4,520
Daniel Glassman Advertising	1,465
Goff Communications	412
Goldberg Fossa Seid Advertising	1,196
Goldfarb Hoff & Co	3,713
Goodby, Berlin & Silverstein	7,920
Goodwin Dannenbaum Littman & Wingfield	7,982
Chester Gore Co	2,352
Grace & Rothschild	7,717
Graff Advertising	771
Grant/Jacoby	6,700
Grant Marketing Communications	1,451
Gray Kirk & Evans	4,484
Great Scott Advertising	5,647
Greenstone Rabasca Roberts	5,828
Gregory Inc	1,179
Grey Advertising	240,679
Griffin Bacal	20,658
Griffith & Coe Advertising	219
Gross Townsend Frank Hoffman	11,756
GSD&M	20,244
Gumpertz/Bentley/Fried	3,258
Gurley Associates	589
Guthrie & Associates	579
Haddon Advertising	4,800
Hahn, Crane & Associates	76
Halbleib & Moll Associates	935
Halcyon Associates	160
Haller Schwarz Meade Ullman	1,094
Hallmark Advertising	3,259
Hameroff/Milenthal/Spence	5,373
Harmon Smith	1,634
Harris, Baio & McCullough	3,477
Harris & Drury Advertising	4,202
Harris & Love Advertising	2,003
Harris West Blaisdell Advertising	2,836
Harrison Advertising	162
Haselow & Associates	1,565
Hautigan Advertising	404
Haynes & Pittenger Direct	993
HDM	30,308
Healy-Schutte & Co	3,108
Henderson Advertising	11,858
Kerker & Associates	3,202
Hesselbart & Mitten Advertising	$9,004
Hickman & Associates	1,060
Hicks & Associates	225
Roni Hicks & Associates	1,929
Hiebing Group	1,539
Hill, Holliday, Connors, Cosmopulos	43,948
Hinton & Steel	393
Hitchcock Fleming & Associates	2,830
Hively Agency	915
Bernard Hodes Group	30,462
Hoffman York & Compton	6,838
J.P. Hogan & Co	1,942
Hollingsworth Inc	695
Houston Advertising	3,742
Hughes Advertising	3,314
Hull & Signorile	631
Human Resources Advertising	674
R.J. Hunter & Associates	318
HutchesonShutze	6,684
Ingalls, Quinn & Johnson	16,932
Integrated Target Marketing	427
James & Thomas	497
Jason Group	1,798
Jayme Organization	5,734
William Jenkins Advertising	659
Jiloty Communications Inc	518
Rick Johnson & Co	2,038
Jordan, McGrath, Case & Taylor	38,500
Jordan Tamraz Caruso Advertising	5,604
Juhl Agency	3,909
Kallir, Philips, Ross	21,231
Lawrence Kaplan Advertising	236
Kaprielian/O'Leary Advertising	1,953
Karsh & Hagan	4,160
Katsin/Loeb & Partners	1,013
Henry J. Kaufman & Associates	6,750
Kaufman & Maraffi Advertising	3,462
Keating Magee Long	697
Keller-Crescent Co	21,302
Keller Haver Lipman	174
Kelley & Wallwork	2,475
Kerker & Associates	3,202
Kern/Mathai Direct Mail Advertising	10,100
Keroff & Rosenberg Advertising	4,245
Kert Advertising	615
Ketchum Communications	112,945
Keye/Donna/Pearlstein	8,751
Keyes Martin & Co	8,750
Killian & Co	264
Kingswood Advertising	1,338
Kinzie & Green	481
KK&M Advertising	2,700
Klemtner Advertising	15,500
Kobs & Draft Advertising	17,747
Kobs Gregory & Passavant	462
Kocs, Wesson & Associates	690
Kolesar & Hartwell	3,453
Kolon, Bittker & Desmond	5,500
Kopf Zimmermann Schultheis	1,004
Kresser, Craig/D.I.K.	9,622
Lally, McFarland & Pantello	7,000
Landers & Partners	1,069
Hal Langerman Co	1,909
Langworth Taylor Co	675
Lardis, McCurdy & Co	831
Larkin, Meeder & Schweidel	4,206
Lauer Markin Gibbs	5,263
Laurence, Charles, Free & Lawson	34,637
Laven Fuller & Perkins Advertising	973
Lavey/Wolff/Swift	16,141
Lawler Ballard	9,094
Lee & Riley	1,959
Al Paul Lefton Co	11,900
Leonard Monahan Lubars & Partners	4,850
Leslie Advertising Agency	4,124
Letven/Diccicco Advertising & PR	2,022
Levine, Huntley, Schmidt & Beaver	37,103
Jack Levy & Associates	8,474
Levy, King & White	7,383
Lewis, Browand & Associates	3,098
Lewis Communications	1,723
Lewis, Gilman & Kynett	15,900
LGFE Inc	7,722
Lieberman-Appalucci	2,480
Liggett-Stashower	10,950
Lintas Worldwide	224,877
Lipman, Richmond, Greene Advertising	2,474
K.I. Lipton Inc	803
Lockhart & Pettus	3,057
Loeffler Ketchum Mountjoy	2,132
Lohman Organization	2,204
Lohmeyer Simpson Communications	4,200
Lois/GGK Chicago	11,400
Lois/GGK New York	14,350
Long, Haymes & Carr	15,517
Lord Einstein O'Neill & Partners	11,356
Lord, Sullivan & Yoder	5,893
Lortz Direct Marketing	1,098
Lowe Marschalk	44,000
Lowe Tucker Metcalf	4,000
Lubicom	495
Lyons Inc	3,751
MacDonald Boyd White	909
Maged & Behar	750
J. Malek Inc	310
Maleson Advertising	1,800
John Malmo Advertising	3,205
Malone Advertising	7,000
MARC Advertising	7,542
Marcus Advertising	3,705
Margeotes Fertitta & Weiss	13,667
Maris, West & Baker	2,277
Marken Communications	593
MarketAide Inc	570
Marketing Lab	181
Marketing Resources	$8,518
Marketing Support	4,251
Marontate & Co	1,558
Marquardt & Roche	3,943
Martcom Inc	2,103
Martin Agency	21,069
Martin Marshall Jaccoma Mitchell	8,250
Martiny & Co	1,848
Martin Thomas	524
Martin-Williams	12,100
Martz & Wadas	1,412
Jack Mathis Advertising	253
Mike Sloan's Matterhorn Advertising	270
McAdams, Richman & Ong	8,545
William Douglas McAdams Inc	15,600
McAndrew Advertising Co	33
McCaffrey & McCall	38,234
McCann-Erickson Worldwide	209,120
McConnaughy Barocci Brown	3,600
McCormick Advertising	1,586
McDougall Associates	3,705
McFarland & Drier	6,500
McFarland Group	2,031
McFrank & Williams Advertising	2,750
McKee Advertising	1,103
McKinney Inc	3,960
McKinney & Silver	15,437
McKone & Co	2,699
McLaughlin, Del Vecchio & Casey	1,275
M.E.D. Communications	12,744
Medicus Intercon International	14,765
Meldrum & Fewsmith	9,500
Mendoza, Dillon & Asociados	7,668
Stan Merritt Inc./Advertising	3,797
Messner Vetere Berger Carey Schmetterer	9,733
Metro Marketing Group	461
Meyer Jehs & Wallis	1,863
Michael & Partners	2,062
Miller Advertising Agency	11,000
Miller Group	83
Miller Meester Advertising	9,000
Mills Marketing	97
William Mills Advertising & Marketing	268
Mintz & Hoke	7,162
Mitchell & Comer	1,482
More Direct	2,021
Eric Mower & Assoc	7,476
MSA Advertising	379
Mullen Advertising	10,457
MWA Direct	409
Mycomm Advertising	288
Frank C. Nahser Inc	3,539
Nash Direct	3,150
Nationwide Advertising Service	31,020
Neiman Group	489
Nemer, Fieger & Associates	1,209
Jeffrey Nemetz & Associates	1,700
Newmark Posner & Mitchell	5,111
New-Venture Advertising	880
NKH&W Marketing Communications	1,654
Noble Communications	10,993
Nordensson Lynn Advertising	1,300
North Castle Partners	7,690
Northlich Stolley LaWarre	5,924
Bruce Novograd Advertising	975
NPC & Associates	387
Ogilvy & Mather Direct Response	44,200
Ogilvy & Mather Worldwide	305,144
Opus Group	405
Ovation Marketing	2,144
Pagano Schenck & Kay	2,098
Paolin & Sweeney Advertising	6,100
Partners & Shevack	14,200
Patterson Advertising Agency	595
Pedone & Partners	4,554
Penny/Ohlmann/Neiman	2,475
Penny & Speier	1,934
Phelps Group	1,163
Phillips Marketing	122
Phillips, Miller, Speyer & Frost	1,735
Pierson & Flynn	1,266
Pihas, Schmidt, Westerdahl Co	3,168
Poindexter Associates	830
Pollak Levitt Chaiet	277
Pool Communications	1,890
Poppe Tyson	10,550
Potter Hazlehurst	3,263
Praco Ltd	835
Price McNabb Advertising	5,739
ProClinica Inc	1,830
Publicis Inc	4,291
Puskar Gibbon Chapin	4,813
QLM Associates	12,448
Qually & Co	1,200
Quest Business Agency	2,777
L. Quillin & Associates	240
Jules Rabin Associates	805
Rainoldi, Kerzner & Radcliffe	2,146
Rapp Collins Marcoa	23,780
Russ Reid Co	11,100
Reimel Carter Advertising	4,048
Rhea & Kaiser Advertising	2,085
Richards Group	18,700
Richardson, Myers & Donofrio	8,135
Richardson, Thomas & Bushman	954
Hal Riney & Partners	33,750
John Risdall Advertising	1,919
Rivers Trainor Doyule & Leicht	1,640
Rosenfeld, Sirowitz, Humphrey & Strauss	19,050
Ross Roy Group	97,661
Rubin Postaer & Associates	17,387
Rubin Reid Noto & Ehrenthal	3,490
Ruhe & Co	356
Ruhr/Paragon	7,436
Rumrill-Hoyt	12,986
Rutkin Costello McCullam Whitley	$725
Saatchi & Saatchi Advertising	395,197
Saatchi & Saatchi Direct	8,538
Sader & Associates	671
Sage Marcom	1,638
Salthouse-Torre-Norton	2,650
Salvati Montgomery Sakoda	3,406
Sandler Communications	1,952
San Jose & Associates	1,406
Sanna, Mattson, MacLeod & Macri	1,203
Sargent & Potratz	1,560
Saugatuck/FKB	7,354
Saunders & Lyons Advertising	1,746
Sawyer Riley Compton	4,177
Saxton Communications Group	820
Scali, McCabe, Sloves	78,963
Scharfberg & Associates	2,000
Schenkein Inc	1,477
Ken Schmidt Co	1,950
Sefton Associates	3,081
Semel/Kaye & Co	1,718
Severance & Associates	613
Rik Shafer & Associates	281
Shea & Ziegler	95
Sheldon Fredericks Advertising	776
Shepler/CoDA & Co	723
Siddall, Matus & Coughter	3,341
Significs Inc	1,461
Silverstone, Adkins & Breit	3,072
Simms & McIvor	1,945
Simons Michelson Zieve	4,681
Sisti, Zinbarg & Howard	1,280
Slater Hanft Martin	10,593
Smith Advertising & Associates	742
Smith & Associates	711
Smith/Greenland	6,800
Smith Group	567
J. Richard Smith Ltd	6,319
Kenneth C. Smith Advertising	4,500
Smith & Yehle	1,011
Soghigian & Macuga Advertising	2,538
Solin Associates	2,117
Spencer Bennett Nowak	2,250
Franklin Speir Inc	3,700
Stein Kilpatrick & Rogan Advertising	461
Stephan & Brady	3,157
Stern Advertising	4,050
Stevens Kirkland Kreer	992
Stiegler, Wells & Brunswick	2,201
Stone, August, Baker	4,361
Stone & Simons Advertising	5,092
Strategic Promotions	1,577
Sturm Communications Group	1,806
Sudler & Hennessey	24,603
Sullivan & Brownell	1,865
Sullivan Higdon & Sink	3,884
Sutton Healthcare Group	7,300
Tarlow Advertising	14,617
Tate's Co	572
Tatham-Laird & Kudner	27,615
Taylor Brown Smith & Perrault	4,529
TBWA Advertising	33,240
TCI Advertising	1,003
Telephone Marketing Programs	37,815
G. Temple Associates	1,471
Tepe, Hensler & Westerkamp	1,067
Armando Testa Advertising	1,600
Thielen & Associates	1,295
Ira Thomas Associates	1,492
Ted Thomas Associates	3,600
J. Walter Thompson Co	266,539
Thompson Recruitment	21,620
Topline Design	1,277
Tortami Metro P.R.omotions	495
Towne, Silverstein, Rotter	12,500
Townsend Agency	1,859
Tracy-Locke	55,576
Trahan, Burden & Charles	5,200
Tri-State Advertising Co	1,157
Tromson Monroe Advertising	3,830
Tucker Wayne/Luckie & Co	14,134
Umphenour Martin Lonsdorf	2,546
Valentine Radford	11,798
Van Dine Humphrey Herbert Alber & Manges	2,044
Peter Vane Advertising	633
VanSant, Dugdale & Co	6,390
Varon & Associates	270
Vickers & Benson/FKQ	3,480
John Volk Co	1,884
Wahlstrom & Co	10,142
Waldbillig & Besteman	2,687
Wardrop Murtaugh Temple	1,716
Waring & LaRosa	6,640
Harold Warner Advertising	1,024
Warren/Kremer Advertising	3,550
Warwick Baker & Fiore	25,500
Wieden & Kennedy	14,700
Weightman Group	16,500
S.J. Weinstein Associates	3,000
Wells, Rich, Greene	132,450
Wendt Advertising Agency	1,722
Edwin Bird Wilson	6,440
Wilson Sculley Associates	2,890
Winius-Brandon Advertising	5,092
Don Wise & Co	675
Wolf Blumberg Krody	4,227
Wolkcas Advertising	1,324
Wunderman Worldwide	38,749
Wyse Advertising	19,875
Richard Yeager Associates	947
Yellow Pages Marketing Services	7,472
Young & Rubicam	409,534
Zechman & Associates	2,576
Zwiren Collins Karo Trusk & Ayer	4,200

*** Dollars in thousands.**

Top 100 ranked U.S. agencies by productivity

Rank	Agency, headquarters	$1 million billed per employee 1989	1988	% chg	Total U.S. employees 1989	1988	% chg	Total U.S. billings 1989	1988	% chg	Total U.S. offices 1989	1988	% chg
1	**Admarketing Inc.**, Los Angeles	1.89	1.63	16.5	133	138	(3.6)	$252.0	$224.5	12.2	1	1	0.0
2	**Towne, Silverstein, Rotter**, New York	1.84	1.84	0.0	45	45	0.0	83.0	83.0	0.0	1	1	0.0
3	**Tarlow Advertising**, New York	1.48	1.48	0.0	74	27	174.1	109.2	39.9	174.1	1	1	0.0
4	**Partners & Shevack**, New York	1.42	0.80	77.1	102	65	56.9	144.5	52.0	177.9	1	1	0.0
5	**Messner Vetere Berger Carey Schmetterer**, New York	1.39	1.76	(21.3)	52	28	85.7	72.1	49.3	46.1	1	1	0.0
6	**Ally & Gargano**, New York	1.37	1.34	2.4	230	220	4.5	316.0	295.2	7.0	2	2	0.0
7	**Avrett, Free & Ginsberg**, New York	1.26	1.49	(15.4)	102	75	36.0	128.8	112.0	15.0	1	1	0.0
8	**Jordan, McGrath, Case & Taylor**, New York	1.12	1.06	5.4	282	283	(0.4)	315.0	300.0	5.0	1	1	0.0
9	**Devon Direct Marketing & Advertising**, Malvern, Pa.	1.08	1.44	(25.0)	76	46	65.2	82.0	66.2	23.9	1	1	0.0
10	**Kern/Mathai Direct Mail Advertising**, Santa Monica, Calif.	1.05	0.61	72.1	15	10	50.0	15.8	6.1	158.2	1	1	0.0
11	**Lois/GGK New York**, New York	1.05	1.05	0.3	95	95	0.0	99.7	99.4	0.3	1	1	0.0
12	**Slater Hanft Martin**, New York	1.03	0.95	8.1	68	56	21.4	69.9	53.3	31.3	1	1	0.0
13	**Wells, Rich, Greene**, New York	1.03	1.01	2.1	860	829	3.7	883.0	833.9	5.9	5	5	0.0
14	**Levine, Huntley, Schmidt & Beaver**, New York	1.02	0.87	18.1	245	250	(2.0)	250.3	216.4	15.7	6	6	0.0
15	**Thomas G. Ferguson Associates**, Parsippany, N.J.	1.01	0.93	8.4	120	110	9.1	120.7	102.1	18.2	1	1	0.0
16	**Wieden & Kennedy**, Portland, Ore.	1.00	0.95	4.8	98	65	50.8	98.0	62.0	58.1	1	1	0.0
17	**McKinney & Silver**, Raleigh, N.C.	0.96	0.98	(1.8)	107	122	(12.3)	102.9	119.5	(13.9)	1	1	0.0
18	**Hal Riney & Partners**, San Francisco	0.95	1.09	(13.5)	238	183	30.1	225.0	200.0	12.5	3	3	0.0
19	**Asher/Gould Advertising**, Los Angeles	0.94	0.82	14.0	99	91	8.8	93.0	75.0	24.0	1	1	0.0
20	**Margeotes Fertitta & Weiss**, New York	0.94	0.92	2.0	95	75	26.7	88.8	68.7	29.3	1	1	0.0
21	**Griffin Bacal**, New York	0.92	0.82	12.4	177	176	0.6	162.7	143.9	13.1	1	1	0.0
22	**Rubin Postaer & Associates**, Los Angeles	0.91	0.87	4.8	157	148	6.1	143.1	128.7	11.2	2	2	0.0
23	**Tatham-Laird & Kudner**, Chicago	0.91	0.76	19.0	254	285	(10.9)	230.1	217.0	6.0	1	1	0.0
24	**Warwick Baker & Fiore**, New York	0.89	0.84	6.3	190	190	0.0	170.0	160.0	6.3	NA	NA	NA
25	**Lord Einstein O'Neill & Partners**, New York	0.88	0.42	110.6	89	78	14.1	78.6	32.7	140.3	1	1	0.0
26	**D'Arcy Masius Benton & Bowles**, New York	0.88	0.78	12.0	2,341	2,288	2.3	2,055.3	1,794.2	14.6	16	19	(15.8)
27	**N W Ayer Inc.**, New York	0.88	0.71	23.8	980	1,337	(26.7)	859.1	946.7	(9.3)	6	7	(14.3)
28	**Leo Burnett Co.**, Chicago	0.88	0.85	3.3	2,222	2,083	6.7	1,945.3	1,765.0	10.2	1	1	0.0
29	**Saatchi & Saatchi Advertising Worldwide**, New York	0.87	0.64	35.8	3,188	3,442	(7.4)	2,778.9	2,209.6	25.8	NA	NA	NA
30	**Kresser, Craig/D.I.K.**, Los Angeles	0.87	0.81	7.0	78	55	41.8	67.7	44.6	51.8	1	1	0.0
31	**QLM Associates**, Princeton, N.J.	0.86	0.80	7.0	96	87	10.3	82.3	69.7	18.0	3	2	50.0
32	**Della Femina, McNamee/EWDB**, New York	0.86	0.67	28.5	851	991	(14.1)	728.7	660.5	10.3	9	11	(18.2)
33	**Laurence, Charles, Free & Lawson**, New York	0.85	0.90	(5.5)	322	334	(3.6)	275.2	302.0	(8.9)	5	5	0.0
34	**Lintas:Worldwide**, New York	0.84	0.70	20.0	1,781	1,917	(7.1)	1,499.9	1,345.4	11.5	20	20	0.0
35	**Chiat/Day/Mojo**, Venice, Calif.	0.84	0.74	13.0	935	812	15.1	785.0	603.5	30.1	10	9	11.1
36	**TBWA Advertising**, New York	0.84	0.93	(10.5)	265	165	60.6	221.6	154.1	43.8	2	2	0.0
37	**Scali, McCabe, Sloves**, New York	0.82	0.79	3.8	717	706	1.6	590.3	559.7	5.5	5	5	0.0
38	**Lowe Marschalk**, New York	0.82	0.76	7.4	363	400	(9.3)	297.3	305.0	(2.5)	3	3	0.0
39	**Mullen Advertising**, Wenham, Mass.	0.81	0.75	8.7	86	79	8.9	69.7	58.9	18.4	1	1	0.0
40	**Backer Spielvogel Bates Worldwide**, New York	0.81	0.73	10.4	2,671	2,685	(0.5)	2,158.0	1,964.2	9.9	23	24	(4.2)
41	**Ogilvy & Mather Worldwide**, New York	0.80	0.69	16.3	2,636	2,732	(3.5)	2,104.4	1,874.9	12.2	43	44	(2.3)
42	**Dailey & Associates**, Los Angeles	0.79	0.71	11.8	196	185	5.9	155.2	131.0	18.4	1	1	0.0
43	**Barry Blau & Partners**, Fairfield, Conn.	0.79	0.72	9.3	128	118	8.5	101.2	85.3	18.6	4	4	0.0
44	**McCann-Erickson Worldwide**, New York	0.79	0.70	13.5	1,767	1,889	(6.5)	1,394.8	1,314.0	6.1	11	11	0.0
45	**DDB Needham Worldwide**, New York	0.79	0.69	13.9	3,025	2,786	8.6	2,386.3	1,929.3	23.7	46	44	4.5
46	**BBDO Worldwide**, New York	0.79	0.67	17.3	3,375	3,598	(6.2)	2,656.0	2,414.3	10.0	47	50	(6.0)
47	**Grey Advertising**, New York	0.78	0.75	2.9	2,067	2,015	2.6	1,605.3	1,520.3	5.6	3	3	0.0
48	**Young & Rubicam**, New York	0.77	0.59	29.4	4,066	4,717	(13.8)	3,114.8	2,791.8	11.6	61	60	1.7
49	**Lois/GGK Chicago**, Chicago	0.76	0.82	(7.6)	105	91	15.4	80.0	75.0	6.7	1	1	0.0
50	**Henderson Advertising**, Greenville, S.C.	0.76	0.72	5.3	106	104	1.9	80.7	75.1	7.3	1	1	0.0
51	**Martin-Williams**, Minneapolis	0.75	0.72	4.2	133	115	15.7	100.0	83.0	20.5	2	1	100.0
52	**J. Walter Thompson Co.**, New York	0.75	0.74	1.2	2,484	2,427	2.3	1,851.0	1,787.9	3.5	65	69	(5.8)
53	**Davis, Ball & Colombatto Advertising**, Los Angeles	0.73	0.63	16.2	201	215	(6.5)	147.4	135.7	8.7	6	4	50.0
54	**Cabot Communications**, Boston	0.73	0.59	23.0	125	161	(22.4)	91.2	95.5	(4.5)	1	1	0.0
55	**Rosenfeld, Sirowitz, Humphrey & Strauss**, New York	0.72	0.94	(22.9)	176	124	41.9	127.0	116.0	9.5	2	2	0.0
56	**Hill, Holliday, Connors, Cosmopulos**, Boston	0.72	0.68	5.2	408	421	(3.1)	293.1	287.4	2.0	3	3	0.0
57	**Deutsch Inc.**, New York	0.72	0.71	0.2	105	77	36.4	75.1	55.0	36.6	1	1	0.0
58	**Bozell Inc.**, New York	0.71	0.65	8.3	1,643	1,665	(1.3)	1,165.0	1,090.0	6.9	9	9	0.0
59	**Ketchum Communications**, Pittsburgh	0.70	0.53	30.3	1,229	1,360	(9.6)	854.9	726.0	17.7	13	13	0.0
60	**Ingalls, Quinn & Johnson**, Boston	0.68	0.61	11.4	202	219	(7.8)	137.1	133.4	2.8	1	1	0.0
61	**HDM**, New York	0.66	0.83	(19.7)	373	277	34.7	247.3	228.9	8.1	6	3	100.0
62	**Earle Palmer Brown**, Bethesda, Md.	0.66	0.61	8.9	469	446	5.2	310.5	271.1	14.5	6	4	50.0
63	**DCA Advertising**, New York	0.66	0.52	27.4	142	137	3.6	94.0	71.2	32.1	2	2	0.0
64	**Foote, Cone & Belding Communications**, Chicago	0.66	0.59	11.5	2,832	3,081	(8.1)	1,871.2	1,825.8	2.5	46	35	31.4
65	**Bayer Bess Vanderwarker**, Chicago	0.66	0.57	16.7	159	150	6.0	105.0	84.9	23.7	1	1	0.0
66	**Bloom Cos.**, Dallas	0.66	0.69	(5.0)	255	263	(3.0)	168.2	182.6	(7.9)	2	2	0.0
67	**William Douglas McAdams Inc.**, New York	0.66	0.67	(2.5)	163	159	2.5	107.0	107.0	0.0	1	1	0.0
68	**Carrafiello-Diehl & Associates**, Irvington-on-Hudson, N.Y.	0.65	0.65	0.9	106	94	12.8	69.4	61.0	13.8	1	1	0.0
69	**Gross Townsend Frank Hoffman**, New York	0.65	0.69	(5.3)	120	109	10.1	78.4	75.2	4.3	1	1	0.0
70	**Geer, DuBois**, New York	0.65	0.63	2.4	201	190	5.8	130.0	120.0	8.3	1	1	0.0
71	**Richards Group**, Dallas	0.64	0.61	5.6	194	166	16.9	125.1	101.4	23.4	1	1	0.0
72	**GSD&M**, Austin, Texas	0.64	0.73	(11.2)	234	171	36.8	150.8	124.1	21.5	1	2	(50.0)
73	**Ross Roy Group**, Bloomfield Hills, Mich.	0.62	0.59	4.6	1,046	955	9.5	651.1	568.1	14.6	16	11	45.5
74	**Cole & Weber**, Seattle	0.62	0.60	3.7	145	156	(7.1)	89.9	93.3	(3.6)	2	3	(33.3)
75	**Tucker Wayne/Luckie & Co.**, Atlanta	0.61	0.64	(5.0)	172	187	(8.0)	104.5	119.7	(12.7)	2	2	0.0
76	**W.B. Doner & Co.**, Southfield, Mich.	0.59	0.54	9.9	523	500	4.6	309.0	268.7	15.0	6	6	0.0
77	**Cramer-Krasselt**, Milwaukee	0.58	0.53	8.4	188	181	3.9	108.6	96.5	12.6	3	3	0.0
78	**Eisaman, Johns & Laws**, Los Angeles	0.57	0.56	2.5	216	199	8.5	124.0	111.5	11.2	3	3	0.0
79	**Ackerman, Hood, & McQueen**, Oklahoma City	0.56	0.50	11.7	114	121	(5.8)	64.2	61.0	5.2	5	5	0.0
80	**Meldrum & Fewsmith**, Cleveland	0.56	0.56	0.2	111	108	2.8	62.0	60.2	3.0	1	1	0.0
81	**Burrell Communications Group**, Chicago	0.55	0.56	(1.3)	110	108	1.9	60.3	60.0	0.5	3	3	0.0
82	**William Cook Agency**, Jacksonville, Fla.	0.55	0.52	5.0	132	147	(10.2)	72.1	76.5	(5.8)	3	4	(25.0)
83	**Weightman Group**, Philadelphia	0.54	0.48	12.2	203	210	(3.3)	110.0	101.4	8.5	3	3	0.0
84	**Nationwide Advertising Service**, Cleveland	0.52	0.49	5.4	398	376	5.9	206.8	185.4	11.5	31	36	(13.9)
85	**Valentine-Radford**, Kansas City, Mo.	0.52	0.48	8.5	153	147	4.1	79.4	70.3	12.9	1	1	0.0
86	**Liggett-Stashower**, Cleveland	0.52	0.52	(0.7)	140	135	3.7	72.4	70.3	3.0	1	1	0.0
87	**Wyse Advertising**, Cleveland	0.51	0.46	11.5	275	231	19.0	140.4	105.8	32.8	3	2	50.0
88	**Long, Haymes & Carr**, Winston-Salem, N.C.	0.50	0.46	9.3	205	181	13.3	103.5	83.6	23.8	1	1	0.0
89	**Russ Reid Co.**, Pasedena, Calif.	0.48	0.45	5.7	155	155	0.0	74.0	70.0	5.7	1	1	0.0
90	**Carmichael Lynch**, Minneapolis	0.46	0.48	(2.9)	190	160	18.8	87.9	76.2	15.3	4	1	300.0
91	**Miller Advertising Agency**, New York	0.46	0.44	4.5	160	190	(15.8)	73.5	83.5	(12.0)	3	4	(25.0)
92	**Al Paul Lefton Co.**, New York	0.46	0.46	0.2	153	149	2.7	70.0	68.0	2.9	2	2	0.0
93	**Evans Communications**, Salt Lake City	0.45	0.44	2.4	356	336	6.0	160.0	147.5	8.5	10	10	0.0
94	**Bentley, Barnes & Lynn**, Chicago	0.42	0.40	3.4	172	136	26.5	71.6	54.8	30.7	4	4	0.0
95	**Noble Communications**, Springfield, Mo.	0.39	0.40	(3.8)	206	190	8.4	80.1	76.8	4.3	3	3	0.0
96	**Lawler Ballard**, Norfolk, Va.	0.38	0.35	9.5	159	151	5.3	60.7	52.6	15.3	5	5	0.0
97	**Telephone Marketing Programs**, New York	0.35	0.30	16.3	716	651	10.0	252.1	197.1	27.9	17	17	0.0
98	**Direct Marketing Group**, New York	0.24	0.24	(0.3)	625	637	(1.9)	149.6	152.9	(2.2)	6	6	0.0
99	**Keller-Crescent Co.**, Evansville, Ind.	0.20	0.20	(0.7)	546	561	(2.7)	106.5	110.3	(3.4)	2	2	0.0
100	**DMCA Direct**, St. Louis	0.15	0.12	21.0	420	390	7.7	81.3	47.1	30.3	1	1	0.0

Notes: Dollars are in millions. $1 million in billings per employee is computed by dividing total U.S. billings in millions by total U.S. employees. See Page S-20 for methodology. Agencies listed are the top 100 ranked U.S. agencies. Subsidiary employee and billing totals (not shown) are included in parent totals.

AA chart: Kevin Brown

MEDIAWORKS

FEBRUARY AD RESULTS

Bridal books steal the show

By Scott Donaton

Here come the brides.

Since most couples get engaged in December and January, February is traditionally a big month for bridal magazines. So it's no surprise Conde Nast Publications' *Bride's* led all other magazines tracked by Publishers Information Bureau in ad pages, followed closely by Cahners Publishing Co.'s *Modern Bride*.

Bride's carried a record 790.68 ad pages in its February/March issue, up 7.2% from last year. The 1,040-page issue was submitted to the "Guinness Book of World Records" as the largest-ever consumer magazine.

Modern Bride also set a record with its February/March issue: 631.45 ad pages, up 3.2%.

"February's a great month for the bridal market because these are the women who received their engagement rings over Christmas and New Year's and are planning spring weddings," said *Bride's* Publisher Elliot Marion.

But February wasn't as kind to other magazines. Total ad-page counts fell an anticipated 1.5% from a year earlier to 13,849.5. Although the drop was considerably less than January's 4.8% slide, combined ad pages for the two months were off 3.7% to 24,175.39.

TV Guide, third behind *Bride's* and *Modern Bride*, was down 18.7% to 537 ad pages for the first two months of 1990. No. 6 *People* carried 409.74 ad pages, a 13.2% decline.

Women's service magazines also posted weak results, with ad pages down an average 11.9% for the first two months. Hearst Corp.'s *Good Housekeeping*, with 218.68 pages (up 3.3%), was the only title among the Seven Sisters to see an increase. *Redbook*, another Hearst title, was down 12.3% with 139.13 ad pages.

Meredith Corp.'s *Better Homes & Gardens* carried 160.79 ad pages in the first two months, a 13.4% drop. Sister publication *Ladies' Home Journal* saw pages for the first two months fall 8.4% to 196.03. Category leader *Family Circle* carried 232.82 pages through February, down 20.1%. After a 25% slide in January, *McCall's* was flat in February with 90.38 pages. Its year-to-date total is down 11.9% to 146.27 pages. *Woman's Day* saw pages fall 20.4% for the period to 165.36.

Among the top three business magazines, only *Forbes* posted gains after two months, giving category leader *Business Week* a run for its money. *Forbes*, an every-other-weekly, carried 466.72 pages through February, a 17.3% jump. *Business Week*, with 471.9 ad pages, was off 11.4%. *Fortune* carried 397.92 ad pages, a 5% decline.

Several second-tier business titles posted strong results. *Entrepreneur* led all business monthlies with 371.17 ad pages, up 12.8%. *The Economist* carried 365.95 pages, up 24.3%. *Money* carried 184.7 ad pages through February, an increase of 5.5%. *Changing Times* was up 6.8%, with 104.22 pages. *Inc.*, with 170.01 pages, was up 21.9%.

General sports books were down. *Sports Illustrated* carried 394.65 pages, down 15.1%. *The Sporting News* saw pages drop 1:.9% to 76.12, and *Sport* carried 50.22 ad pages, down 24.7%.

Elsewhere, *The New Yorker* was up 15% through February with 329.67 ad pages. *Golf Digest's* pages rose 17.8% to 250.43, while *Rolling Stone* carried 226.57 ad pages, up 6.6%. *Town & Country* was up 17% with 215.32 ad pages. *Vanity Fair* posted a gain of 9.8% to 150.13 pages. And *Premiere*, with 112.17 ad pages, was up 15.6%.

Among Sunday newspaper magazines tracked by PIB, *The Los Angeles Times Magazine* posted a 19.2% decline with 108.77 ad pages. *The New York Times Magazine* saw its pages fall 8% to 455.36, while *Parade's* pages dropped 5% to 97.1. *USA Weekend*, with 102.66 pages, was up 7.5%. ☐

MediaWorks is coordinated by Wayne Walley.

Magazine ad-page leaders

Publishers Information Bureau figures for January to February 1990.

Rank	Magazine	Pages	% chg	Dollars	% chg
1	Bride's	790.68	7.2	14,078,204	18.0
2	Modern Bride	631.45	3.2	10,169,710	8.5
3	TV Guide	537.00	(18.7)	57,849,739	(10.9)
4	Business Week	471.90	(11.4)	28,032,450	(6.6)
5	Forbes	466.72	17.3	20,046,110	22.7
6	People	409.74	(13.2)	38,872,272	(1.7)
7	Fortune	397.92	(5.0)	19,760,838	2.7
8	Sports Illustrated	394.65	(15.1)	50,668,770	(6.5)
9	Entrepreneur	371.17	12.8	3,379,620	41.0
10	The Economist	365.95	24.3	3,007,626	38.3
11	Time	348.81	(11.5)	48,759,058	(8.0)
12	Vogue	329.75	(6.8)	12,764,820	22.4
13	The New Yorker	329.67	15.0	8,779,103	33.7
14	New York Magazine	327.41	(20.6)	4,865,024	(19.4)
15	Yachting	320.25	(3.0)	1,864,708	(4.9)
16	Newsweek	308.47	(13.7)	33,235,288	(5.7)
17	Golf Magazine	293.73	(7.3)	7,745,023	4.8
18	Cosmopolitan	276.94	(11.2)	15,959,958	(4.2)
19	Salt Water Sportsman	260.93	(21.1)	1,593,198	(27.3)
20	American Way	257.02	1.0	3,420,218	18.2
21	Architectural Digest	254.67	1.0	9,560,530	5.6
22	Golf Digest	250.43	17.8	10,954,002	(0.3)
23	U.S. News & World Report	246.34	(9.1)	19,561,690	(0.1)
24	Family Circle	232.82	(20.1)	18,805,702	(12.8)
25	Rolling Stone	226.57	6.6	7,772,098	5.9
26	W	225.18	(13.1)	5,239,200	2.2
27	Good Housekeeping	218.68	3.3	21,103,752	21.0
28	Town & Country	215.32	17.0	5,030,928	34.2
29	Ebony	213.23	6.3	7,243,444	18.4
30	GQ	212.12	0.6	4,987,469	3.0
31	Elle	206.15	(2.5)	6,237,953	4.3
32	Skin Diver	203.78	(6.9)	1,916,611	(2.9)
33	Popular Photography	197.76	23.4	4,782,868	40.4
34	Ski	197.35	(8.0)	4,076,251	5.3
35	Ladies' Home Journal	196.03	(8.4)	13,246,329	(0.7)
36	Muscle & Fitness	194.61	(30.7)	3,334,116	(10.9)
37	Sunset	193.01	(7.1)	5,847,744	8.6
38	Travel & Leisure	187.96	(7.7)	7,411,585	11.5
39	Metropolitan Home	187.22	12.1	5,294,672	1.9
40	Money	184.70	5.5	11,251,158	5.3
41	Parents	182.01	(3.8)	7,398,149	0.3
42	Texas Monthly	178.98	9.7	1,808,398	5.4
43	Black Enterprise	177.49	3.5	2,353,477	15.1
44	Harper's Bazaar	174.32	18.1	4,804,967	24.5
45	Glamour	174.17	(17.6)	9,587,625	(8.1)
46	Car & Driver	171.98	(8.2)	6,586,376	(8.9)
47	Inc.	170.01	21.9	6,776,129	29.4
48	Southern Living	169.77	(7.2)	8,704,254	4.7
49	Mademoiselle	168.34	(8.6)	5,820,250	10.4
50	Woman's Day	165.36	(20.4)	12,010,482	(15.0)
51	Working Woman	162.32	9.5	4,385,496	10.5
52	Better Homes & Gardens	160.79	(13.4)	18,043,185	(10.2)
53	Gourmet	159.73	6.3	4,134,069	19.2
54	Bassmaster	157.78	(8.6)	2,965,716	(2.5)
55	Smithsonian	156.26	0.6	6,367,765	2.3
56	Self	155.58	(5.8)	5,609,839	6.2
57	Jet	152.00	(15.6)	2,512,529	(7.5)
58	Reader's Digest	151.12	(4.3)	15,623,069	13.4
59	Vanity Fair	150.13	9.8	5,426,112	46.4
60	Conde Nast Traveler	148.30	23.1	4,036,214	56.6
61	San Francisco Focus	146.59	(14.0)	922,822	(11.5)
62	Country Living	146.30	(10.0)	5,821,676	(4.3)
63	McCall's	146.27	(11.9)	9,899,953	(3.0)
64	Skiing	144.87	2.1	3,336,310	1.1
65	Mirabella	143.97	1,000.0	1,929,179	100.0
66	Financial World	143.75	33.3	3,316,649	64.7
67	Esquire	140.90	(5.3)	4,265,859	0.8
68	Redbook	139.13	(12.3)	8,675,169	(11.6)
69	Bon Appetit	138.26	(2.9)	4,119,736	8.9
70	Road & Track	135.47	(21.8)	3,942,031	(22.3)
71	Four Wheeler	132.50	(8.8)	948,550	(6.2)
72	New Woman	127.36	(11.2)	3,214,665	(2.8)
73	Delta Sky	126.67	(12.4)	3,330,400	(2.1)
74	Yankee	122.60	(5.4)	1,453,176	1.5
75	Seventeen	120.86	5.3	3,947,307	18.2
76	Motor Trend	120.23	(12.2)	4,218,545	(9.7)
77	Sports Afield	118.38	(5.1)	2,095,359	14.8
78	Essence	118.16	(25.7)	2,799,726	(16.6)
79	Hot Rod	117.73	(18.6)	2,521,383	(18.4)
80	Popular Mechanics	117.29	(7.5)	3,677,503	0.8
81	House & Garden	117.14	16.6	2,799,854	14.7
82	Home Office Computing	114.45	14.7	1,710,794	34.7
83	Outdoor Life	114.28	(23.3)	3,287,261	(22.7)
84	Field & Stream	114.24	(11.6)	4,451,111	(17.9)
85	Spectrum	113.93	(13.6)	980,655	(10.5)
86	Art & Antiques	113.28	10.8	823,509	14.9
87	Premiere	112.17	15.6	1,907,088	38.2
88	Working Mother	111.13	7.2	2,305,331	27.1
89	Omni	110.08	(11.2)	3,422,993	2.3
90	M Magazine	110.00	(0.9)	1,319,203	9.7
91	True Story	105.49	6.8	1,469,422	3.8
92	Changing Times	104.22	6.8	2,736,161	15.8
93	Connoisseur	103.57	(3.5)	1,768,079	1.6
94	Playboy	100.54	(31.0)	6,759,826	(20.7)
95	Prevention	98.02	(16.8)	3,382,817	(6.7)
96	House Beautiful	97.33	(10.4)	3,306,848	(3.3)
97	Star Magazine	95.16	(20.1)	3,272,798	(12.9)
98	Penthouse	94.67	(8.2)	3,942,902	3.2
99	1,001 Home Ideas	92.64	(7.8)	2,748,427	18.1
100	Life	91.53	(21.1)	7,757,985	(19.5)

Percent change is computed from January through February 1989 pages by PIB.

Source: Publishers Information Bureau

THE HOTTEST MEN'S MAGAZINE OF THE YEAR

Men'sHealth®

A Rodale Press Publication. Contact Michael Rooney, 708 Third Ave., New York, NY 10017. 212/697-2040.

CONSUMER MAGAZINE AD LINAGE

	February		Year-to-date	
	1990	1989	1990	1989
■ Auto/cycle/rec. vehicles				
AutoWeek (52X)	132.5	119.9	274.4	261.8
Car & Driver C	72.8	81.3	172.0	187.3
Car Collector & Car Classics	17.0	19.0	36.6	37.0
Car Craft	59.5	57.1	107.0	110.2
Circle Track	116.3	115.1	177.8	170.7
Cycle	28.3	33.5	53.8	68.6
Cycle World	39.3	41.3	70.2	64.3
Dirt Rider	31.8	30.5	64.1	61.7
Dune Buggies & Hot VWs	65.2	66.3	132.3	135.7
Family Motor Coaching	149.9	150.2	299.8	346.2
4 Wheel & Off-Road	66.3	67.3	127.6	131.7
Four Wheeler C	67.0	73.4	132.5	145.3
Hot Rod C	74.0	63.9	117.7	146.5
Motorcyclist	27.1	37.0	45.3	58.0
Motor Trend C	66.5	69.6	120.2	136.9
Motorhome	91.8	94.5	177.3	174.9
Rider	20.5	26.2	43.5	49.1
Road & Track C	73.5	87.3	135.5	172.8
Trailblazer	37.0	47.0	73.0	91.0
Trailer Life	85.0	90.3	163.2	179.8
Total Group	**1,321.3**	**1,370.8**	**2,523.7**	**2,729.6**
% change	**-3.6%**		**-7.5%**	
■ Boating & yachting				
Boating	173.6	189.5	340.6	390.3
Chesapeake Bay	42.1	52.0	71.4	89.8
Cruising World	104.2	95.0	199.8	200.0
Lakeland Boating (11X)	96.5	98.5	177.5	188.5
Motor Boating & Sailing	146.5	194.7	284.5	382.7
Sail	95.0	120.0	268.4	226.6
Trailer Boats (11X)	75.3	83.4	149.2	172.1
Western Boatman (6X)	29.5	—	64.0	51.0
Yachting C	128.6	130.1	320.3	330.0
Total Group	**891.3**	**963.3**	**1,875.7**	**2,030.9**
% change	**-7.5%**		**-7.6%**	
■ Civic/fraternal				
Elk (10X)	14.0	20.0	30.5	37.3
Kiwanis	15.4	14.8	41.2	29.0
Lion (10X)	6.6	5.2	6.6	5.2
Rotarian	16.4	11.7	32.2	22.9
V.F.W. (11X)	28.2	35.5	54.6	69.8
Total Group	**80.6**	**87.2**	**165.1**	**164.2**
% change	**-7.5%**		**0.6%**	
■ General				
American Health (10X) C	—	—	75.2	71.2
American Heritage (8X) C	43.0	48.6	43.0	48.6
American Legion	34.8	60.4	80.4	101.8
American West (6X)	22.1	21.5	22.1	21.5
Art & Antiques (10X) C	56.4	44.7	113.3	102.2
ARTnews (10X)	94.3	97.5	214.8	184.0
The Atlantic A. C	45.6	45.2	87.3	111.3
Bon Appetit A. C	80.4	73.9	138.3	142.4
Cable Guide C	27.9	29.8	55.0	66.4
Changing Times C	56.5	50.0	104.2	97.6
Conde Nast Traveler C	91.1	67.1	148.3	120.5
Connoisseur C	52.8	51.7	103.6	107.3
Consumers Digest (6X) C	—	—	21.4	24.0
Cooking Light C	—	—	55.9	49.4
Ebony C	129.2	125.9	213.2	200.6
European Travel & Life C	47.0	—	47.0	35.4
Food & Wine C	44.9	55.8	87.9	101.7
Golden Years (6X)	—	27.7	33.4	53.3
Gourmet C	96.3	92.6	159.7	150.3
Harper's Magazine A. C	29.2	42.3	63.0	74.0
Harrowsmith (6X)	—	—	50.0	60.9
Islands (6X)	—	—	51.7	56.5
Let's Live	54.0	58.0	99.0	103.0
Life C	33.6	45.2	91.5	116.0
Modern Maturity (6X) C	41.8	41.8	41.8	41.8
Money C	99.7	88.4	184.7	175.0
Mother Earth News C	—	—	65.7	73.0
National Geographic C	30.4	27.5	51.1	37.3
National Geographic Traveler (6X) C	—	—	21.7	15.1
Natural History C	43.4	52.8	74.2	91.6
New Choices C	30.1	43.8	49.9	74.2
Prevention C	61.7	62.6	98.0	116.5
Psychology Today C	—	—	30.1	41.5
Reader's Digest A. C	92.0	91.9	151.1	158.0
Saturday Evening Post (9X) C	39.5	—	39.5	44.4
Smithsonian C	76.6	87.2	156.3	155.3
Town & Country C	125.4	116.8	215.3	184.1
Travel-Holiday C	38.5	41.8	67.8	63.5
Travel & Leisure C	101.3	135.8	188.0	203.5
Travelhost	1,294.0	1,192.0	2,405.0	2,361.0
Vanity Fair C	97.9	90.8	150.1	136.8
Yankee C	60.1	66.9	122.6	129.6
Total Group	**3,271.4**	**3,177.9**	**6,262.2**	**6,301.9**
% change	**2.9%**		**-0.6%**	
■ Home				
Americana (6X)	—	—	12.0	21.6
Architectural Digest A. C	137.8	143.4	254.7	252.2
Better Homes & Gardens C	96.2	111.2	160.8	185.6
Colonial Homes (6X) C	46.8	55.8	46.8	55.8
Columbus Monthly-Homes (4X)	—	—	26.7	29.8
Country Home (6X) C	31.3	44.1	31.3	44.1
Country Living C	93.8	97.3	146.3	162.6
Family Handyman (10X) A. C	35.7	46.3	59.0	82.4
Florida Home & Garden	83.3	93.5	139.1	201.3
Flower & Garden (6X) C	50.5	55.8	50.5	55.8
Home C	41.0	59.3	80.5	99.5
Home Mechanix C	29.4	33.4	63.1	70.1
Homeowner (10X) C	27.8	40.9	27.8	40.9
Horticulture	38.7	45.4	86.5	87.5
House Beautiful C	55.4	63.8	97.3	108.6
House & Garden C	68.1	56.3	117.1	100.5
Metropolis	—	—	61.9	61.9
Metropolitan Home C	125.9	110.2	187.2	167.0
Midwest Living C	41.0	52.3	41.0	52.3
1,001 Home Ideas C	49.6	50.5	92.6	100.5
Organic Gardening (10X) C	43.0	49.0	83.3	103.1
Phoenix Home/Garden	60.8	81.7	117.7	148.0
Practical Homeowner (9X) C	39.9	36.7	69.8	36.7
San Diego Home/Garden	76.7	57.8	134.5	130.0
Southern Accents (6X) C	—	—	60.1	71.6
Southern Living C	79.2	97.7	169.8	182.9
Sunset Magazine A. C	117.1	120.1	193.0	207.7
Workbench (6X)	31.3	39.7	31.3	39.7
Total Group	**1,500.3**	**1,642.0**	**2,641.7**	**2,899.4**
% change	**-8.6%**		**-8.9%**	
■ In-flight & other passenger				
Aboard Group(6X)	—	—	37.7	35.3
Alaska Airlines	69.0	59.8	138.5	118.6
America West Airlines	66.2	67.5	147.5	136.5
American Way (24X) C	146.4	127.4	257.0	254.5
East/West Network:				
Continental Profiles	46.5	62.3	97.3	113.6
Eastern Review	29.2	69.8	62.7	125.8
Pan Am Clipper	44.4	48.8	82.0	82.5
Southwest Spirit	47.3	69.8	95.1	124.5
TWA Ambassador	35.3	48.6	73.3	92.1
Vis 'A Vis	58.3	96.7	118.8	166.0
Halsey Publication:				
Delta Sky C	63.7	67.1	126.7	144.6
Pace Communications:				
US Air Magazine	55.4	67.3	111.6	93.0
Spirit of Aloha	34.6	25.2	67.8	50.4
Total Group	**696.3**	**810.3**	**1,416.0**	**1,537.4**
% change	**-14.1%**		**-7.9%**	
■ Men's				
Esquire A. C	78.1	74.8	140.9	148.8
Firehouse Magazine	28.3	25.6	64.2	62.2
Gentlemen's Quarterly A. C	144.1	128.3	212.1	210.8
M Magazine C	75.0	76.0	110.0	111.0
Muscle & Fitness C	95.8	138.6	194.6	280.8
Penthouse A. C	37.8	47.9	94.7	103.2
Playboy A. C	42.4	47.6	100.5	145.7
Salute (10X)	44.5	27.0	44.5	27.0
Total Group	**546.0**	**565.8**	**961.5**	**1,089.4**
% change	**-3.5%**		**-11.7%**	
■ Metropolitan				
Aloha (6X)	—	—	45.5	26.7
Atlanta	59.7	55.5	114.5	110.5
Baltimore	62.0	73.0	109.1	123.0
Boston	91.2	140.7	181.8	259.9
California C	53.9	50.0	90.7	84.9
Chicago	57.2	75.7	156.4	194.2
Chicago's North Shore	73.4	78.4	151.5	167.9
Cincinnati	44.3	50.6	76.8	84.8
Cleveland	29.6	33.7	68.5	72.9
Columbus Monthly	46.2	39.0	104.2	97.7
Connecticut	78.6	96.0	173.8	174.1
D/Magazine	48.7	69.0	92.3	124.0
Detroit Monthly	45.0	46.2	95.3	103.5
Grand Rapids	26.2	33.3	49.5	63.6
Honolulu	46.6	54.7	97.0	104.0
Houston Metropolitan Magazine	45.2	41.9	98.0	87.2
Inside Chicago (8X)	—	—	17.0	37.5
Los Angeles	123.5	145.5	244.1	266.8
Louisiana Life (6X)	—	—	30.6	27.5
Madison	44.0	48.0	80.0	86.0
Memphis	59.0	62.7	106.1	123.8
Mid Atlantic Country	31.2	33.9	63.7	60.1
Milwaukee	45.3	33.5	90.3	74.2
Minneapolis/St. Paul	106.1	111.7	200.2	179.6
Minnesota Monthly Magazine	64.1	37.2	117.1	87.2
Nashville	50.0	52.0	108.0	104.0
New England Monthly	25.1	41.3	83.9	95.4
New Jersey Monthly	46.0	66.5	114.8	143.7
New Mexico	19.1	22.4	110.4	118.3
Ohio	38.5	35.3	95.0	88.4
Orlando	87.0	84.0	187.0	171.0
Pacific Northwest	35.9	33.5	73.9	67.5
Palm Beach Life	97.4	115.3	184.4	212.7
Palm Springs Life	154.7	184.3	325.5	362.7
Philadelphia	109.0	118.8	236.2	241.5
Phoenix	47.8	68.5	94.6	116.7
Pittsburgh	57.3	54.2	103.0	97.0
Rhode Island Monthly	42.8	44.2	93.3	87.9
Sacramento Magazine	44.5	46.8	103.3	93.4
St. Louis	39.3	35.9	74.7	77.6
San Diego	111.1	114.8	228.9	220.4
San Francisco Focus C	83.0	101.4	146.6	170.3
Sarasota	93.0	94.0	199.0	187.0
South Florida Magazine	93.0	99.2	194.6	226.9
Texas Monthly C	76.7	67.3	179.0	163.1
Ultra	37.0	42.1	37.0	94.3
The Virginian (6X)	—	—	45.0	43.0
Washington (10X)	—	—	29.7	48.0
The Washingtonian	128.2	172.0	247.7	329.5
Total Group	**2,797.2**	**3,103.8**	**5,940.3**	**6,381.8**
% change	**-9.9%**		**-6.8%**	
■ Music/entertainment				
Audio	72.3	100.3	180.7	209.7
Dance Magazine	66.9	59.3	131.7	118.5
Playbill	45.0	52.9	84.5	93.5
Video Magazine	60.5	56.3	141.5	127.3
Total Group	**244.6**	**268.9**	**538.4**	**549.0**
% change	**-9.0%**		**-1.9%**	
■ Outdoor & sport				
Alaska	42.0	47.0	78.0	81.0
The American Handgunner (6X)	—	—	54.0	54.0
American Hunter	21.7	20.1	38.1	35.9
American Rifleman	22.4	20.1	44.9	40.7
Backpacker (7X) C	23.6	—	23.6	23.2
Bass Master (10X) A. C	97.5	100.8	157.8	172.7
Bicycling (9X) C	75.8	99.9	75.8	99.9
Cross Country Skier	24.1	23.5	73.6	70.5
Ducks Unlimited (6X)	—	—	22.6	29.6
Field & Stream C	65.4	76.0	114.2	129.2
Fishing World (6X)	51.8	—	80.3	40.3
Florida Sportsman	177.5	180.7	311.0	306.6
Golf Digest C	147.3	124.5	250.4	212.7
Golf Illustrated C	42.7	36.5	42.7	36.5
Golf Magazine C	109.4	152.5	293.7	316.8
Gun Dog (6X)	—	—	38.2	40.0
Guns	40.0	34.0	82.0	68.0
Guns & Ammo	41.5	47.8	73.5	85.1
In-Fisherman (7X)	67.5	97.8	160.8	210.8
Outdoor Life C	64.1	80.2	114.[illegible]	149.1
Outside Magazine	48.6	42.8	84.9	81.2
Petersen's Hunting	40.3	42.2	69.6	79.9
Runner's World (12X) C	22.7	21.2	52.0	50.5
Salt Water Sportsman	95.4	131.0	260.9	330.8
Shooting Times	34.5	32.4	62.6	62.0
Sierra (6X)	—	—	29.0	53.4
Ski (8X) A. C	80.9	80.8	197.4	214.5
Skiing (7X) A. C	65.2	58.0	144.9	141.9
Skin Diver C	117.7	116.2	203.8	219.0
Southern Outdoors (9X)	62.4	77.2	97.8	113.9
Southern Saltwater (8X)	46.7	60.6	94.8	118.9
Sport Magazine C	29.6	43.7	50.2	66.7
Sports Afield C	58.4	78.4	118.4	124.7
Surfing	76.6	85.1	140.7	141.1
Tennis C	45.7	54.3	88.6	89.0
Waterski (9X)	—	—	93.3	96.5
Western Outdoors (10X)	49.7	55.1	79.6	86.2
Wildfowl (6X)	—	—	23.9	25.5
Wing & Shot (6X)	—	—	14.1	16.8
World Tennis C	42.4	41.8	63.1	62.8
Total Group	**2,030.8**	**2,162.1**	**4,099.0**	**4,377.6**
% change	**-6.1%**		**-6.4%**	
■ Photography				
American Photographer C	—	23.0	40.6	58.5
Petersen's Photographic	20.2	23.3	40.0	50.2
Popular Photography C	97.2	73.5	197.8	160.2
Total Group	**117.4**	**119.9**	**278.4**	**268.9**
% change	**-2.1%**		**3.5%**	
■ Science/electronic/mech				
Discover C	35.9	43.6	70.2	79.5
Home Office Computing C	51.3	46.8	114.5	99.8
Omni C	66.9	68.7	110.1	124.0
Personal Computing	140.2	166.6	291.2	363.0
Popular Mechanics C	73.6	77.2	117.3	126.8
Popular Science C	46.0	60.4	87.8	117.0
Scientific American C	34.8	27.4	72.4	60.7
Spectrum C	43.6	50.8	113.9	132.2
Total Group	**492.3**	**541.3**	**977.4**	**1,102.9**
% change	**-9.1%**		**-11.4%**	
■ Woman/fashion/service				
Beauty Magazine (10X)	—	15.2	18.7	15.2
Bride's Magazine (6X) A. C	790.7	737.3	790.7	737.3
Cosmopolitan A. C	159.7	182.9	276.9	312.0
Elle C	143.8	140.6	208.2	213.5
Essence C	65.2	88.0	118.2	159.0
Family Circle (17X) A. C	171.0	195.2	232.8	291.2
Glamour C	109.7	133.1	174.2	211.4
Good Housekeeping A. C	142.7	117.4	218.7	211.8
Harper's Bazaar C	120.0	106.5	174.3	147.6
Health C	35.5	31.7	65.8	66.0
Imagen	80.3	78.0	131.4	120.0
Ladies' Home Journal C	112.8	129.3	196.0	213.9
Lear's C	42.4	—	91.5	69.8
Mademoiselle C	113.7	127.3	168.3	184.1
McCall's C	90.4	91.2	146.3	166.1
Military Lifestyle (10X)	37.0	47.2	82.7	-94.9
Modern Bride (6X) C	631.5	611.8	631.5	611.8
New Woman C	74.4	80.9	127.4	143.4
Parents Magazine A. C	118.1	112.9	182.0	189.1
Redbook C	83.4	82.5	139.1	158.6
Savvy C	41.0	46.8	71.1	88.6
Self C	93.7	92.3	155.6	165.1
Seventeen C	67.5	66.7	120.9	114.8
Shape C	42.8	58.2	85.4	111.8
Soap Opera Digest (26X) C	34.6	36.2	59.3	67.4
Soap Opera Update	7.0	9.0	14.5	18.0
Teen Magazine	30.9	30.6	59.7	52.8
True Story A. C	61.4	60.1	105.5	98.8
Vogue C	227.9	254.9	329.8	353.7
W Magazine C	155.9	171.7	225.2	259.3
Weight Watchers C	43.7	34.8	78.1	68.1
Woman (10X) C	25.2	43.6	42.9	43.6
Woman's Day (15X) A. C	90.6	112.6	165.4	207.7
Workbasket	27.2	25.9	50.5	51.4
Working Mother C	66.7	60.2	111.1	103.7
Working Woman C	74.7	77.1	162.3	148.2
Total Group	**4,212.7**	**4,289.3**	**8,011.7**	**8,350.3**
% change	**-1.8%**		**-4.1%**	
■ Youth				
Boys' Life C	23.1	19.9	42.0	39.7
Campus Life (10X)	30.3	35.7	87.9	77.3
Total Group	**53.4**	**55.6**	**129.9**	**117.1**
% change	**-3.9%**		**11.0%**	
■ Business/national				
Barron's	132.3	122.3	265.0	259.2
Black Enterprise C	129.2	138.3	177.5	171.5
Business Month C	33.0	16.0	65.0	42.6
Business Week (52X) A. C	230.4	285.9	471.9	532.6
Entrepreneur C	150.2	127.9	371.2	329.2
Financial World (26X) C	69.8	62.0	143.8	107.8
Forbes (26X) C	219.6	172.4	466.7	397.9
Fortune (26X) C	140.1	142.8	397.9	418.9
Frequent Flyer	39.3	42.0	71.3	72.4
Futures	40.6	38.5	78.9	79.0
Inc. Magazine C	93.6	56.7	170.0	139.5
Income Opportunities	91.1	100.4	91.1	100.4
Industry Week (23X) A	81.5	79.6	170.1	140.7
Nation's Business (12X) A. C	24.3	33.8	51.2	72.9
Total Group	**1,474.9**	**1,418.7**	**2,991.6**	**2,864.5**
% change	**4.0%**		**4.4%**	
■ Business/regional				
Advantage-Nashville's Bus. Mo.	66.0	60.0	132.0	112.0
Arizona Bus. Gazette (52X)	49.0	51.0	89.0	92.0
Baltimore Bus. Jrnl	58.6	66.8	123.5	130.2
Bus. Jrnl.-Milwaukee	130.2	143.0	297.7	284.3
Bus. Jrnl.-Sacramento	68.4	72.9	158.0	141.8
Bus. North Carolina	36.7	42.2	61.7	60.3
Capital Dist. Bus. Review (52X)	54.7	51.4	113.5	119.5
Caribbean Business	94.5	76.9	143.7	141.5
Crain's Chicago Bus. (52X)	101.1	133.5	201.8	227.3
Crain's Cleveland Bus. (52X)	53.6	58.3	109.5	127.3
Crain's Detroit Bus. (52X)	73.5	73.3	149.7	139.3
Crain's New York Bus. (52X)	49.9	44.2	93.5	80.0
Florida Trend (13X)	31.0	42.4	73.3	99.1
Georgia Trend	30.8	39.7	62.7	87.0
Grand Rapids Bus. Jrnl	51.0	45.6	98.9	94.2
Hawaii Business	36.8	42.1	78.3	79.9
Houston Bus. Jrnl. (52X)	71.0	64.0	133.0	121.0
Indianapolis Bus. Jrnl. (52X)	128.7	145.3	246.6	278.5
Manhattan Inc. C	—	—	60.1	69.2
New England Bus. (12X) A	38.3	41.3	64.0	103.5
New Orleans City Bus.	—	—	52.0	44.9
Pacific Bus. News (52X)	88.0	101.5	175.0	198.9
Philadelphia Business Jrnl	120.3	116.4	234.8	233.6
Pittsburgh Bus. Times (52X)	72.9	87.9	168.2	183.3
Providence Bus. News	64.4	72.6	127.0	142.6
Regardie's/Washington	145.0	169.0	283.0	331.0
St. Louis Bus. Jrnl. (52X)	100.8	100.1	190.8	198.8
Warfield's Monthly Baltimore	52.8	57.3	109.7	100.0
Total Group	**1,887.9**	**1,998.6**	**3,831.0**	**4,021.0**
% change	**-5.5%**		**-4.7%**	
■ National Sunday mags				
Parade (52X) C	46.9	44.1	97.1	102.3
USA Weekend (52X) C	50.3	40.2	102.7	95.5
Vista Magazine (52X)	13.6	21.8	24.2	38.3
Total Group	**110.8**	**106.1**	**224.0**	**236.0**
% change	**4.4%**		**-5.1%**	
■ Newspaper Sunday magazine				
Boston Globe	162.2	197.1	307.7	345.2
Chicago Tribune	84.5	90.5	148.7	155.4
Cleveland Plain Dealer	41.7	50.3	74.4	81.1
The Dallas Morning News	45.9	73.4	84.1	117.3
Detroit Free Press	35.0	29.0	61.0	62.0
L.A. Times C	63.9	63.6	108.8	134.7
Louisville Courier-Jrnl.	21.0	22.0	39.0	57.0
New York Times Mag. C	285.0	293.5	455.4	495.1
Philadelphia Inquirer	82.3	76.6	125.5	136.4
Seattle Times	65.0	60.0	120.0	114.0
St. Louis Post Dispatch	60.3	69.0	119.3	135.3
Toledo Blade Magazine	29.9	33.3	50.2	57.9
Washington Post	93.1	90.2	167.9	212.1
Total Group	**1,069.9**	**1,148.5**	**1,861.9**	**2,103.5**
% change	**-6.8%**		**-11.5%**	
■ Weeklies/bi-weeklies				
The Advocate (26X)	134.7	138.9	304.4	349.2
Army Times Military Group:				
Air Force Times (52X)	140.9	152.6	286.8	297.9
Army Times (52X)	133.8	144.8	287.2	281.2
Navy Times (52X)	152.4	164.6	291.3	323.2
Capper's (26X)	27.9	43.7	75.1	94.2
Commonweal (22X)	8.0	2.6	15.8	15.4
Golf World (40X)	116.6	102.1	272.8	220.6
Grit (52X) A	32.0	36.0	72.3	80.1
National Journal (50X) C	37.0	42.9	71.5	85.9
National Review (25X)	32.6	25.6	46.9	44.2
New Republic (48X)	35.7	42.0	76.9	83.2
New York Mag. (50X) C	179.8	238.3	327.4	412.2
New Yorker C	163.2	135.7	329.7	286.8
Newsweek (52X) A. C	162.5	199.6	308.5	357.4
People (51X) C	235.5	262.6	409.7	471.8
Rolling Stone (25X) C	146.7	131.2	226.6	212.6
Sporting News (52X) C	35.2	34.8	76.1	86.4
Sports Illustrated (52X) A.C	247.6	273.1	394.7	464.6
Time (52X) A. C	160.8	205.8	348.8	394.1
TV Guide (52X) A. C	284.0	353.6	537.0	660.6
US Magazine (26X) C	55.7	53.4	85.4	84.3
U.S. News & World Report (50X) A. C	135.1	151.6	246.3	270.9
Total Group	**2,657.6**	**2,935.4**	**5,091.2**	**5,576.7**
% change	**-9.5%**		**-8.7%**	

NOTES: (X) represents the number of times published each year; publications are monthly unless otherwise specified. A. Sectional linage included but prorated to circulation of regional editions. C. Figures supplied by Publishers Information Bureau. All other figures are supplied by the magazines. *Ad Age* makes no attempt to verify figures and is not responsible for inconsistencies or errors. Compiled by Kathy Welyki.

Shades of summer

Suncare products fight slower sales

By Pat Sloan

Procter & Gamble Co.'s Bain de Soleil is changing its colors—again.

Two years ago, Bain de Soleil redefined the "St. Tropez tan" by lightening up veteran model Chris Zeimer to a lightly toasted hue from a deep brown.

Now, the marketer has a new angle on the most fashionable tan under the sun. Three different shades of tans will be featured in print ads breaking in April magazines and in TV spots airing around Memorial Day.

Themed "Beautiful color today. Beautiful skin tomorrow," the ads show Ms. Zeimer restored to her former bronzed self but accompanied by more lightly tanned models.

Rosenfeld, Sirowitz, Humphrey & Strauss, New York, is the agency.

"In consumer research, we found over two-thirds of women surveyed feel more attractive, healthier with a tan," said a spokeswoman for Richardson-Vicks, the P&G unit that markets Bain de Soleil. "We wanted to focus on the fact that Bain de Soleil offers a range of products that allow you to choose the color you desire."

The company is also running separate print ads under "The beautiful color" theme for Exact Couleur, a new cream that tans without exposure to the sun.

No. 3 ranked Bain de Soleil isn't the only player trying to more effectively segment the $500 million-plus suncare category. The category's growth slowed to about 10% last year after several years of high double-digit gains fueled by sunscreen sales.

Jack Surrette, VP-marketing at Tanning Research Labs, the No. 2 suncare marketer, said, "There's no question about segmenting, and our advertising will show the same thing. We're moving away from institutional ads. It's indicative of the market where there are so many subcategories."

In the past, Tanning Research Labs has been best known for its Hawaiian Tropic tanning products. The company also has a number of other spinoffs such as Sunsitive with hypoallergenic protection.

"Our brand identity is solidly entrenched, but we've got state-of-the-art formulas that we've in effect kept secret because we haven't addressed them," Mr. Surrette said. He noted that ads from Babbit & Reiman, Atlanta, this year will focus on sunscreens, self-tanning, paba-free products and new products with "100% natural protection."

For some time, Plough, the category leader with a 35% share, has marketed several lines including Coppertone, Tropical Blend and Shade.

THE ELEGANT COLORS OF ST TROPEZ
BAIN DE SOLEIL

Bain de Soleil promotes products for three different shades of tan.

For 1990, the company is increasing ad spending 20% to $10 million-plus and shifting its focus to print from TV.

"Magazines enhance segmentation," said Steve Bobowski, VP-suncare marketing. "They give us the chance to hone in and tell our story on each of our different products."

For example, the Coppertone brand will run eight- and four-page ads spotlighting different products via Della Femina, McNamee WCRS, New York.

Under the Coppertone umbrella, Plough also markets Water Babies sunscreens for kids. The fast-growing children's segment is getting crowded, but Plough thinks there may be room for one more brand.

Last year, it tested a line of Mickey Mouse sunscreens and is now negotiating with Walt Disney Co. for a national launch.

The children's segment is one of the few that's been pioneered by the mass market and not the upscale department store trade. Department store sales account for 20% of the category.

Estee Lauder Inc., one of the leaders in department store suncare for adults, will add its first children's product this year, called Baby Block Children's Waterproof Sunscreen SPF 30+.

Although department store brands have lagged in this segment, they're still innovative in others. Those brands were the first to differentiate between the two types of ultraviolet rays, and the brands' next hot button will be infrared rays, said Lauder Senior VP-Creative Marketing June T. Leaman.

This spring, Lauder ads from AC&R, featuring model Paulina Porizkova, will tout the benefits of the Special Protection Complex ingredient in fighting damage from all three types of rays.

Department stores are also pushing year-round protection. That concept is filtering down to the mass market, where products like Plough's Shade are now being purchased out of season by some shoppers for everyday use.

Tanning Research Labs' 100% natural protection product, called Hawaiian Tropic Daily Protective Moisturizer, is also described on packaging as an anti-aging formula.

Unilever's upscale Elizabeth Arden division is so committed to year-round protection that the company has stopped advertising seasonal suncare products to concentrate on products like Immunage Defense Lotion and Cream. The spot TV, print and direct-mail effort will be handled in-house.

"We view protection as a greater issue and need than [just] from Memorial Day through Labor Day," said VP-Marketing James Miner. ☐

AdWatch

(Continued from Page 12)

previous 30 days.

Last month, 1,000 adults were polled by phone. The survey's margin of error is plus or minus 3.1%.

Among other changes in February:

- Despite finishing second in unaided recall, Pepsi-Cola led aided awareness within the **soft-drink** category, named first by 35.2% of survey respondents. Coca-Cola was second with 32.6% and Diet Coke third with 12.6%.
- Ford placed third in unaided overall recall. But when respondents were specifically asked to recall **car and truck** advertising, 22.1% named Chevrolet first, followed by Ford with 21.8%. Toyota was a distant third with 8.4%.
- In the **fast-food** category, McDonald's Corp. was named first by 55.7% of the respondents, followed by Burger King Corp.'s 10% and Wendy's International's 8.1%. ☐

For more information, contact the Gallup Organization, 301 S. 6th St., Lincoln, Neb. 68506. Phone: (402) 489-0351.

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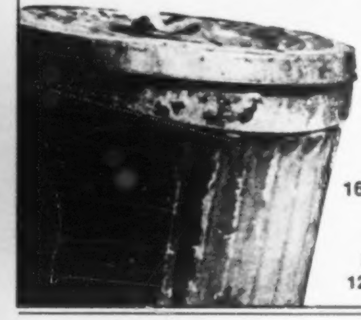

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